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ABSTRACT

This study investigated the existence of coordinated/consolidated services between colleges and universities and their communities by surveying 27 university communities of similar size and/or characteristics to Clemson University (South Carolina). The report begins with the profiles of the universities selected: their size in acreage, enrollment, and population; housing; and location. Next, areas of service consolidation that have been found to exist between the school and the community are discussed. The services include: police and fire protection; medical care; waste disposal (solid and hazardous); recreation; transportation services and maintenance; and water service. Coordinated activities of the university community that are done to enhance the quality of life in the community are described; these include planning and land regulation, environmental efforts, technology transfer, and energy initiatives. In addition, the report reveals the problems inherent in city/university relationships and what other communities may be doing to address these issues; these include parking and traffic congestion, land use and zoning, childcare, recreational opportunities, and student/community relations. Appendices include the study's questionnaire and several examples of school/community policies and agreements. (GLR)

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# A STUDY OF COORDINATED SERVICE PROVISION AND ADMINISTRATIVE PROCEDURES IN SELECTED UNIVERSITY COMMUNITIES

**APRIL 1990**

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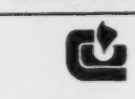

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# A STUDY OF
# COORDINATED SERVICE PROVISION AND ADMINISTRATIVE PROCEDURES IN SELECTED UNIVERSITY COMMUNITIES

**APRIL 1990**

**PRESENTED TO:**

**THE CONSOLIDATION SUBCOMMITTEE OF THE JOINT CITY OF CLEMSON/CLEMSON UNIVERSITY COMMITTEE**

**BY:**

**THE STROM THURMOND INSTITUTE OF GOVERNMENT AND PUBLIC AFFAIRS AT CLEMSON UNIVERSITY**

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## EXECUTIVE SUMMARY

University communities offer unique opportunities as well as their own set of problems that must be addressed. The present study evolved from deliberations on the part of the Joint City of Clemson/Clemson University Committee that focused on the possibilities for joint service provisions. To solicit input, the Consolidation Subcommittee of the Joint Committee approached the Strom Thurmond Institute at Clemson University to assist with a survey of university communities having similar population and enrollment sizes as well as similar functional relationships. Both the university and municipality were contacted for twenty-seven (27) communities. Seventy-six (76) percent or forty-one (41) of the contacts agreed to participate, and all of the communities had representation by either the municipality and/or the university.

In general, municipalities and universities are working together to address areas of common concern. Still, some clear lines of demarcation exist. In all cases, the university is exempt from local property taxes, and, in most cases, the university is exempt from the local regulatory apparatus. For that reason, the respective universities and municipalities may tend to operate as separate enclaves unto themselves despite areas of common concern and potential for cooperative arrangements.

Nonetheless, some cooperative arrangements have been established. In the area of service provision, the most often cited areas of cooperation were in fire protection and sewer service. Seventy-four (74) percent of the interviewed university communities had cooperative arrangements with respect to fire protection. The provision of sewer service was the next most frequently cited area of service cooperation with seventy (70) percent of the communities jointly arranging this effort. To a lesser extent, water and ambulance service provision were cooperative ventures between the university and the municipality. This coordination may be due, in part, to the association with sewer service and fire service contracts. In thirty-seven (37) percent of the communities, water service is coordinated and in thirty-three (33) percent, ambulance service is jointly arranged. One area where strong consolidation efforts are beginning to emerge, though often in conjunction with additional governmental entities, is in transit provision.

In some cases, the municipality may provide a specific service to the university without any additional compensation; although, in a few cases, the university will make voluntary contributions to cover costs. More frequently, lump sum payments and/or user charges are assessed based upon the relative share of the service allocated among the individual entities.

Areas of service consolidation tend to be quite specific. Typically, arrangements are made in areas of mutual benefit resulting from engineering or economic scale. In communities were service consolidation has occurred, the results generally have been positive. The issue which does frequently surface, however, is related to the perception of inequitable funding.

Seventy-four (74) percent of the interviewed communities are within the municipal boundaries. There does not appear to be a strong indication that the communities within the limits are more likely to jointly provide services. One of the major advantages, however, is the municipality's ability to increase the population figures by counting university residents; thereby increasing funding entitlements. This is particularly important during a period of rising expectations in terms of public services and a more slowly rising tax base.

University communities are working together on other endeavors which are advantageous to both entities. Economic development efforts are particularly notable in many of the communities. The municipalities and universities frequently have business incubators and/or research centers which use the technical expertise of the university personnel and the recruiting capabilities of the municipality. On a less formal basis, internships, planning, environmental efforts, and information transfer are coordinated. These efforts occur often on an individual basis and less frequently as an administrative function. Often, the interchange stems from university employees who reside within the municipal limits and participate in the activities of both entities.

The most frequently cited issues which develop between the entities relate to parking as well as off-campus student housing. In the majority of the communities, both entities perceive a general shortage of parking spaces. The lack of coordination in the planning of spaces and regulatory cost of policing available spaces often create negative impacts, particularly on the municipality. Ninety-three (93) percent of the communities perceive a problem with the impact of student housing on the neighborhoods. In general, the demand for off campus student housing is a result of the increasing university enrollments without increasing university residential facilities. In many cases, the incompatible lifestyles of students and families is the primary issue and is magnified when student housing encroaches into established single household neighborhoods. Related, to some extent, to both of these problem areas is the issue of transportation. Communities are indicating that a widespread, reliable transit system as well as safe pedestrian and bike routes may alleviate some of the issues. With these factors in place, commuters may be encouraged to leave vehicles at home. In addition, student apartments could be located further from campus where land is more available, thus, not an encroaching on established single household areas.

Many of the communities have established organizations to address some of the issues and opportunities which are unique to university communities. In some cases, the groups serve as a forum for presenting and discussing the plans of the individual entities. This forum provides an opportunity for feedback and discussion of potential impacts. For the most part, the municipality/university relationship has been enhanced by these formalized efforts. At the same time, however, communities also realize the importance of informal communication, particularly at the operating level.

There is no doubt that the presence of a university in close proximity to a municipality has a bearing on service provision, local housing markets, economic development potential, educational opportunities, and other unique concerns. In many of the interviewed communities, the entities are trying to coordinate efforts to alleviate some of the problems

and pursue the opportunities which develop because of this arrangement. The differing responsibilities of the entities often make coordination difficult. The university has a statewide mission and in turn, is responsible to the state taxpayers. The municipality, on the other hand, is responsible to the local citizenry. When university communities have been able to take advantage of available opportunities or have jointly addressed issues, progress has often stemmed from a mutually agreed upon mechanism for discussion of relevant issues. In conclusion, communication at all levels with strong support by the top administration is crucial to addressing the issues as well as the opportunities which face university communities.

## PURPOSE

The Joint City University Committee is composed of representatives from Clemson University, the City of Clemson, and the local business community. The purpose of the Committee is to provide a forum for discussion of the issues and opportunities which are unique to the university community.

Recently, the Committee has held discussions regarding the coordination and consolidation of services provided by both entities. In an effort to better understand the options that might exist, the Consolidation Subcommittee, an appointed group of the Joint City University Committee, was charged with investigating city/university service delivery arrangements employed in other university communities and reporting back to the committee as a whole. As the Subcommittee began discussions, it realized that there are possibly other non-service related efforts which might be beneficial for the university community to consider. To provide input in this process, the Subcommittee has selected twenty-seven university communities to interview in which the city or university is of similar size and /or with characteristics similar to the Clemson/Clemson University situation. This information will provide a base of information for the City and University to draw upon in discussing the potential consolidation of service provision as well as other joint efforts and issues.

## PROCESS

In October 1989, the project officially commenced when the Consolidation Subcommittee contracted with the Strom Thurmond Institute at Clemson University to administer the interviews and provide technical assistance toward the preparation of this report. Initially, a background library investigation was conducted to aid in determining which communities would be contacted. The population counts for the cities and accompanying university enrollments were used in an initial screening. Other information used in selecting sites included: the number of students housed on campus, the ratio of university enrollment to city population, the city and university density, as well as known joint efforts by individual communities. Twenty seven (27) university communities were identified for further study. See Table 1. The majority of the communities are in the eastern half of the United States with approximately one fourth of the communities in the western half of the country. See Map 1. In an attempt to achieve a balanced perspective, input was sought from university as well as municipality representatives in each community.

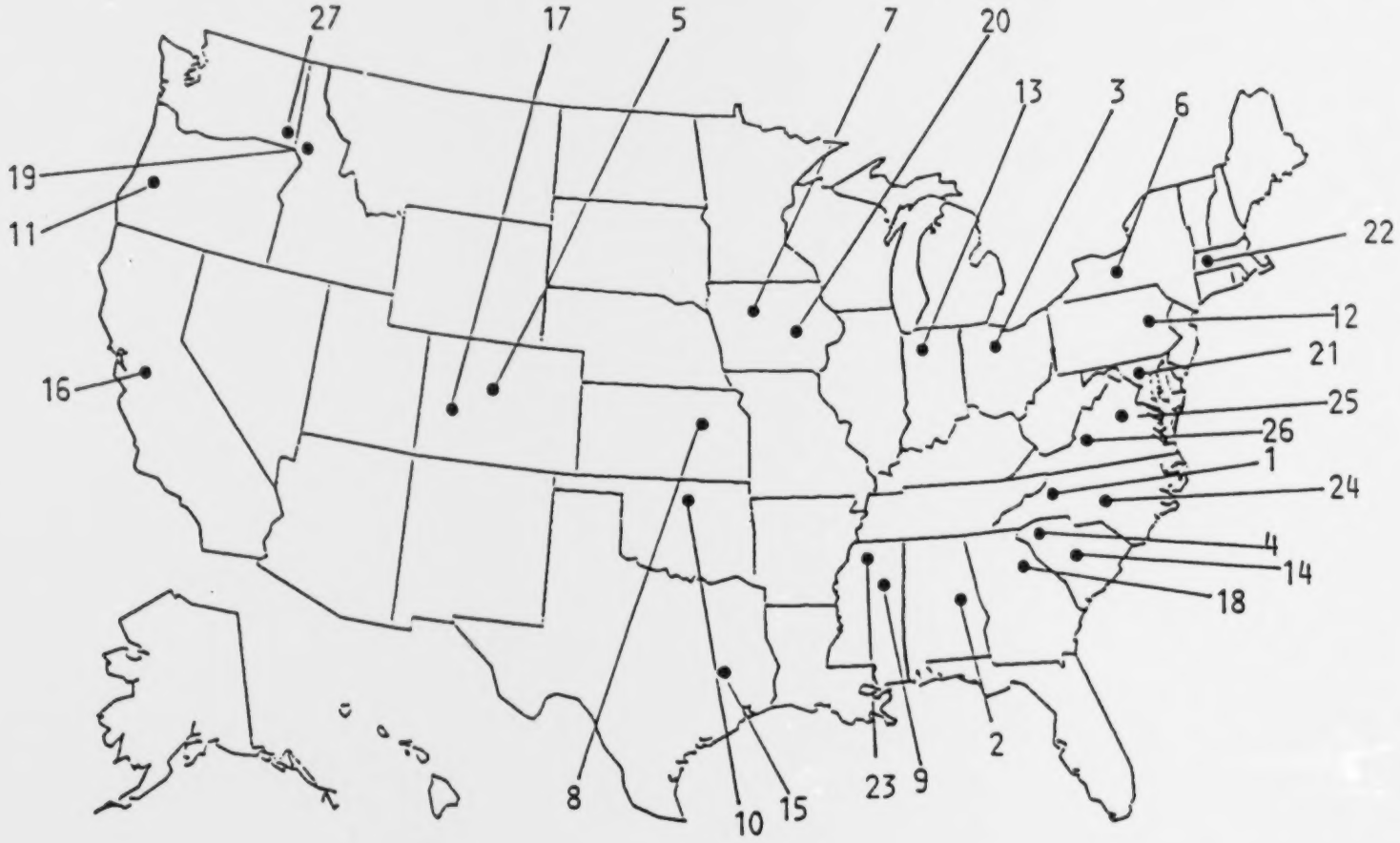
A telephone questionnaire was developed, reviewed and revised by the Subcommittee. See Appendix A. President Max Lennon of Clemson University and Mayor Larry Abernathy of the City of Clemson then drafted and sent a letter and summary questionnaire to the corresponding president or chancellor of the selected universities and the mayor of the municipalities. The letter requested their participation in the study and asked that the name and phone number of an appropriate contact person be sent to the Subcommittee. See Appendix B.

Of the fifty-four (54) contacts made, there was an initial positive response rate of sixty-seven (67) percent. As time permitted, follow-up calls where made to ensure representation from at least one entity in each community bringing the participating response rate up to seventy-six (76) percent or a total of forty-one (41) participating contacts. See Table 2. Three of the contacts declined to participate and ten of the initial contacts or nineteen (19) percent did not respond. However, all of the communities have representation by the university or the municipality and in approximately fifty (50) percent of the communities, both entities responded.

The telephone interviews began the latter part of January, 1990. The time for the interviews averaged fifty minutes per contact. The interviews were finalized the end of February and results were tallied in March. A summary of the interview results follows with answers categorized by profile, service coordination, or issue area.

**Table 1**
**University Community Contacts**

| | University | Municipality |
|---|---|---|
| 1. | Appalachian State | Boone, NC |
| 2. | Auburn University | Auburn, AL |
| 3. | Bowling Green State University | Bowling Green, OH |
| 4. | Clemson University | Clemson, SC |
| 5. | Colorado State University | Fort Collins, CO |
| 6. | Cornell University | Ithaca, NY |
| 7. | Iowa State University | Ames, IA |
| 8. | Kansas State University | Manhattan, KS |
| 9. | Mississippi State University | Starkville, MS |
| 10. | Oklahoma State University | Stillwater, OK |
| 11. | Oregon State University | Corvallis, OR |
| 12. | Pennsylvania State University | State College, PA |
| 13. | Purdue University | West Lafayette, IN |
| 14. | South Carolina State University | Orangeburg, SC |
| 15. | Texas A&M University | College Station, TX |
| 16. | University of California | Davis, CA |
| 17. | University of Colorado | Boulder, CO |
| 18. | University of Georgia | Athens, GA |
| 19. | University of Idaho | Moscow, ID |
| 20. | University of Iowa | Iowa City, IA |
| 21. | University of Maryland | College Park, MD |
| 22. | University of Massachusetts | Amherst, MA |
| 23. | University of Mississippi | Oxford, MS |
| 24. | University of North Carolina | Chapel Hill, NC |
| 25. | University of Virginia | Charlottesville, VA |
| 26. | Virginia Polytechnic Institute and State University | Blacksburg, VA |
| 27. | Washington State University | Pullman, WA |




**Map One**
**University Communities Contacted**
(Numbers Correspond with Table One)

**Table 2**

**Universities and Municipalities Contacted and Responses***

| University | Municipality | Univ. | Muni. |
|---|---|---|---|
| Appalachian State | Boone, NC | N | Y |
| Auburn Univ. | Auburn, AL | Y | Y |
| Bowling Green State Univ. | Bowling Green, OH | Y | Y |
| Clemson Univ. | Clemson, SC | Y | Y |
| Colorado State Univ. | Fort Collins, CO | Y | Y |
| Cornell University | Ithaca, NY | Y | - |
| Iowa State Univ. | Ames, IA | Y | Y |
| Kansas State Univ. | Manhattan, KS | N | Y |
| Mississippi State Univ. | Starkville, MS | Y | Y |
| Oklahoma State Univ. | Stillwater, OK | Y | - |
| Oregon State Univ. | Corvallis, OR | Y | - |
| Pennsylvania State Univ. | State College, PA | Y | - |
| Purdue Univ. | West Lafayette, IN | N | Y |
| South Carolina State Univ. | Orangeburg, SC | Y | Y |
| Texas A&M Univ. | College Station, TX | Y | Y |
| Univ of California | Davis, CA | Y | - |
| Univ. of Colorado | Boulder, CO | - | Y |
| Univ. of Georgia | Athens, GA | Y | Y |
| Univ. of Idaho | Moscow, ID | Y | Y |
| Univ. of Iowa | Iowa City, IA | Y | Y |
| Univ. of Maryland | College Park, MD | Y | Y |
| Univ. of Massachusetts | Amherst, MA | - | Y |
| Univ. of Mississippi | Oxford, MS | - | Y |
| Univ. of North Carolina | Chapel Hill, NC | Y | - |
| Univ. of Virginia | Charlottesville, VA | Y | Y |
| Virginia Polytechnic Institute | Blacksburg, VA | Y | Y |
| Washington State Univ. | Pullman, WA | - | Y |

*Y = Will participate
N = Will not participate
- = Did not respond

Cumulative Totals for Municipalities and Universities Contacted

| | | Univ. | Muni. |
|---|---|---|---|
| Y | = | 20 | 21 |
| N | = | 3 | 0 |
| - | = | 4 | 6 |

## UNIVERSITY COMMUNITY PROFILE

This section provides a generalized locational and demographic profile for the interviewed communities. Where there was no response or a respondent was unsure of numerical information, Petersons' Higher Education Directory, 1989, Peterson's Guide to Four Year Colleges, 1990, U.S. Census of Population, 1980, and/or the City/County Data Book, 1990, were consulted to provide a basis for comparison and discussion.

### ESTABLISHMENT DATES AND RELATIVE LOCATION

Table 3 reflects that the establishment dates for the municipalities and universities range from 1759 to 1945 with the mid-1800s as the most frequent incorporation or establishment time period for each of the entities. In approximately fifty-five (55) percent of the communities, the municipalities were established before the universities. It does appear somewhat significant that in approximately fifty (50) percent of the communities, both the university and the accompanying principal municipality were officially authorized within a ten year time frame.

There is not a strong correlation between the university/municipality establishment dates and whether the university is in or out of the municipal limits. The majority of the universities are located within the municipal boundaries. In fact, only seven of the universities are not in the municipal limits, including Clemson, Kansas State, Mississippi State, Oklahoma State, Purdue, University of California-Davis, and University of Mississippi. It is important to note, however, that most of the universities are adjacent to the municipal limits. Three of the universities, Cornell, South Carolina State, and University of Virginia, cross the municipal boundaries. Cornell is located within three municipalities; however, the majority of the university is located within the city of Ithaca. South Carolina State is split down the center by the city of Orangeburg with dormitories and athletic facilities as the major uses out of the city limits. Any property acquisitions occurring at the University of Virginia after 1955 are in the city of Charlottesville. Approximately ninety (90) percent of the University of Virginia lands were acquired before 1955 and are out of the municipal limits.

### ACREAGE AND SURROUNDING LAND USES

The communities were asked for main campus acreage as well as total acreage. It appears that there may be differing interpretations of main campus. For this reason and to provide consistency to the comparisons, Peterson's Guide to Four Year Colleges, 1990 is utilized in all comparisons pertaining to university acreage.

Seventy-four (74) percent of the universities in the interviewed communities are land grant institutions where relatively large acreage holdings are common. See Table 4. Acreages for the universities range from 147 acres at South Carolina State in Orangeburg to approximately 5000 acres at Texas A&M in College Station. See Table 5.

## Table 3
## Establishment Dates and Relative Location

| University/Municipality | Date Established | | University In/Out Of Municipal Limits | |
|---|---|---|---|---|
| | University | Municipality | In | Out |
| Appalachian State/Boone, NC | 1899 | 1872 | • | |
| Auburn Univ./Auburn, AL | 1856 | 1847 | • | |
| Bowling Green State Univ./Bowling Green, OH | 1910 | 1855 | • | |
| Clemson Univ./Clemson, SC | 1893 | 1892 | | • |
| Colorado State Univ./Fort Collins, CO | 1870 | 1864 | • | |
| Cornell University/Ithaca, NY | 1865 | 1888 | • | •[1] |
| Iowa State Univ./Ames, IA | 1858 | 1864 | • | |
| Kansas State Univ./Manhattan, KS | 1863 | 1857 | | • |
| Mississippi State Univ./Starkville, MS | 1878 | 1854 | | • |
| Oklahoma State Univ./Stillwater, OK | 1890 | 1891 | | • |
| Oregon State Univ./Corvallis, OR | 1868 | 1857 | • | |
| Pennsylvania State Univ./State College, PA | 1855 | 1896 | • | |
| Purdue Univ./West Lafayette, IN | 1869 | 1924 | | • |
| South Carolina State Univ./Orangeburg, SC | 1896 | 1883 | • | •[2] |
| Texas A&M Univ./College Station, TX | 1876 | 1938 | • | |
| Univ. of California/Davis, CA | 1905 | 1868 | | • |
| Univ. of Colorado/Boulder, CO | 1876 | 1888 | • | |
| Univ. of Georgia/Athens, GA | 1785 | 1802 | • | |
| Univ. of Idaho/Moscow, ID | 1889 | 1888 | • | |
| Univ. of Iowa/Iowa City, IA | 1847 | 1853 | • | |
| Univ. of Maryland/College Park, MD | 1856 | 1945 | • | |
| Univ. of Massachusetts/Amherst, MA | 1863 | 1759 | • | |
| Univ. of Mississippi/Oxford, MS | 1844 | 1837 | | • |
| Univ. of North Carolina/Chapel Hill, NC | 1793 | 1851 | • | |
| Univ. of Virginia/Charlottesville, VA | 1819 | 1888 | • | •[3] |
| Virginia Polytechnic Insitute/Blacksburg, VA | 1872 | 1871 | • | |
| Washington State Univ./Pullman, WA | 1892 | 1889 | • | |

[1]Cornell is located in three contiguous municipalities including the city of Ithaca, town of Ithaca, and the village of Cayuga Heights; however the primary location is the city of Ithaca.

[2]The municipal boundary intersects SC State's Campus. The dormitories and athletic facilities are out of the city limits.

[3]At least 90% of the University is in Albemarle County and not within the municipal boundaries. Any university acquisitions after 1955 are in the city of Charlottesville.

**Table 4**
**Land Grant Universities**

| University | Land Grant |
|---|---|
| Appalachian State | No |
| Auburn Univ. | Yes |
| Bowling Green State Univ. | No |
| Clemson Univ. | Yes |
| Colorado State Univ. | Yes |
| Cornell University | Yes |
| Iowa State Univ. | Yes |
| Kansas State Univ. | Yes |
| Mississippi State Univ. | Yes |
| Oklahoma State Univ. | Yes |
| Oregon State Univ. | Yes |
| Pennsylvania State Univ. | Yes |
| Purdue Univ. | Yes |
| South Carolina State Univ. | Yes |
| Texas A&M Univ. | Yes |
| Univ. of California | Yes |
| Univ. of Colorado | No |
| Univ. of Georgia | Yes |
| Univ. of Idaho | Yes |
| Univ. of Iowa | No |
| Univ. of Maryland | Yes |
| Univ. of Massachusetts | Yes |
| Univ. of Mississippi | No |
| Univ. of North Carolina | No |
| Univ. of Virginia | No |
| Virginia Polytechnic Insitute | Yes |
| Washington State Univ. | Yes |

## Table 5
## Campus Acreage, Municipality Acreage, and Campus/Municipality Ratio

| | Main Campus Acreage (Interviews)[1] | Campus Acreage (Peterson's)[2] | Municipal Acreage[3] | Municipal Acreage Minus Campus Acreage | Campus to Munic. Acreage Ratio |
|---|---|---|---|---|---|
| Appalachian State/Boone, NC | -- | 225 | 3,200 | 2,975 | 1:13.2 |
| Auburn Univ./Auburn, AL | 1,875 | 1,871 | 17,920 | 16,049 | 1:8.6 |
| Bowling Green State Univ./Bowling Green, OH | 1,200 | 1,247 | 12,800 | 11,553 | 1:9.3 |
| Clemson Univ./Clemson, SC | 1,400 | 1,400 | 4,000 | 4,000 | 1:2.9 |
| Colorado State Univ./Fort Collins, CO | 830 | 833 | 26,880 | 26,047 | 1:31.3 |
| Cornell University/Ithaca, NY | 750 | 740 | 3,584 | 2,844 | 1:3.8 |
| Iowa State Univ./Ames, IA | 1770 | 1000 | 12,890 | 11,890 | 1:11.9 |
| Kansas State Univ./Manhattan, KS | -- | 668 | 6,910 | 6,910 | 1:10.3 |
| Mississippi State Univ./Starkville, MS | 4,000 | 4,200 | 6,000 | 6,000 | 1:1.4 |
| Oklahoma State Univ./Stillwater, OK | 820 | 500 | 16,512 | 16,512 | 1:33 |
| Oregon State Univ./Corvallis, OR | 422 | 400 | 7,680 | 7,280 | 1:18.2 |
| Pennsylvania State Univ./State College, PA | 5,000 | 540 | 3,200 | 2,660 | 1:4.9 |
| Purdue Univ./West Lafayette, IN | -- | 1565 | 3,200 | 3,200 | 1:2 |
| South Carolina State Univ./Orangeburg, SC | 147 | 147 | 4,725 | 4,578 | 1:31.1 |
| Texas A&M Univ./College Station, TX | 6,000 | 5,142 | 17,920 | 12,778 | 1:2.5 |
| Univ. of California/Davis, CA | 3,600 | 3,600 | 4,544 | 4,544 | 1:1.3 |
| Univ. of Colorado/Boulder, CO | -- | 650 | 12,160 | 11,510 | 1:17.7 |
| Univ. of Georgia/Athens, GA | 588 | 1,502 | 10,808 | 9,306 | 1:6.2 |
| Univ. of Idaho/Moscow, ID | 1,460 | 1,200 | 3,026 | 1,826 | 1:1.5 |
| Univ. of Iowa/Iowa City, IA | 436 | 1880 | 13,950 | 12,070 | 1:6.4 |
| Univ. of Maryland/College Park, MD | 1,328 | 1,378 | 3,200 | 1,822 | 1:1.3 |
| Univ. of Massachusetts/Amherst, MA | -- | 1273 | 17,920 | 16,647 | 1:13.1 |
| Univ. of Mississippi/Oxford, MS | -- | 2,300 | 7,040 | 7,040 | 1:3.1 |
| Univ. of North Carolina/Chapel Hill, NC | 600 | 474 | 8,960 | 8,486 | 1:17.9 |
| Univ. of Virginia/Charlottesville, VA | 2,440 | 2,000 | 6,941 | 6,941 | 1:3.5 |
| Virginia Polytechnic Insitute/Blacksburg, VA | 2,000 | 2,600 | 12,065 | 9,465 | 1:3.6 |
| Washington State Univ./Pullman, WA | -- | 620 | 3,776 | 3,156 | 1:5.1 |

[1]Provided by respondent. Data basis varies. Where "--" appears, there was no response.
[2]Peterson's Guide to Four Year Colleges, 1990.
[3]Where acreage counts not provided, Census of Population, Number of Inhabitants, 1983, was consulted.
[4]Where the university is within the municipal boundary, university acreage has been subtracted from municipal acreage to calculate the ratio.

Municipal acreages range from 3,026 acres in Moscow, ID, to 26,880 acres in Fort Collins, CO. Approximately forty-one (41) percent of the interviewed municipalities have less than 6,000 acres.

The ratios of university acreage to city acreage range from 1:1.3 in the cases of University of Maryland/College Park and University of California/Davis to 1:33 for Oklahoma State/ Stillwater. Forty-four (44) percent of the communities have ratios within the 1:1.3 to 1:5 range. It may be somewhat significant that half of these communities with ratios in the lower ranges, i.e. where university acreage is large relative to city acreage, are not within the municipal boundaries.

With the large variation in university and municipal acreages, it is difficult to numerically categorize the land uses surrounding the campus. In broad terms, residences and agricultural lands are the primary surrounding uses. In some of the cities, the neighborhoods immediately adjacent to the universities are perceived as transitional areas with large homes converted into rental units, fraternity/sorority houses, and small apartment buildings. The single household areas adjacent to campus are often older, with relatively expensive housing and in a large percentage of the communities, the homes are primarily owner occupied. In most of the communities, there is a well established, though limited commercial district near the campus which caters to university students, employees, visitors, as well as the residents. The land grant universities generally abut a significant amount of agricultural acreage.

**ENROLLMENT AND POPULATION**

Enrollment data collected from the communities varied as to full-time equivalent or total head counts as well as the date for which the figures pertain. In an attempt to provide some consistency, Fall 1988 enrollment figures from the Peterson's Guide to Four Year Colleges, 1990 are used for comparison purposes.

Enrollments for the universities range from 4,399 at South Carolina State to 39,163 at Texas A&M. See Table 6. Over half of the interviewed universities have enrollments greater than 20,000. The percentage of undergraduate students varies from sixty-five (65) percent to ninety-four (94) percent of the total enrollments. Over thirty (30) percent of the total enrollments at Cornell, University of Idaho, University of North Carolina, and University of Virginia are in graduate programs.

The dates for population estimates range from 1980, with the U.S. Census, to late 1989, so comparisons of communities must be made with discretion and in relative terms. As further depicted in Table 6, municipal populations in the communities offer a rather wide range from 10,000 in Clemson, SC, to 91,000 in Fort Collins, CO. Fifty-two (52) percent of the municipalities are in the mid-range with populations between twenty and forty thousand. Twenty-two (22) percent of the communities have populations between 10,000 and 20,000 and only three, of the communities had populations over 50,000, including Boulder and Fort Collins, CO and College Station, TX.

## Table 6
## Enrollment and Population

| | Total Enrollment (Interviews)[1] | 1988 Total Enrollment (Peterson's)[2] | Percent Under-graduate | Municipal Population[3] | Ratio of Enrollment to Population |
|---|---|---|---|---|---|
| Appalachian State/Boone, NC | -- | 11,130 | 92 | 12,143 | 1:1.1 |
| Auburn Univ./Auburn, AL | 21,701 | 20,553 | 90 | 40,000 | 1:1.9 |
| Bowling Green State Univ./Bowling Green, OH | 18,043 | 17,882 | 88 | 25,728 | 1:1.4 |
| Clemson Univ./Clemson, SC | 16,072 | 14,794 | 80 | 10,000 | 1:.7 |
| Colorado State Univ./Fort Collins, CO | 17,748 | 19,885 | 84 | 91,000 | 1:4.6 |
| Cornell University/Ithaca, NY | 18,000 | 18,088 | 70 | 26,480 | 1:1.5 |
| Iowa State Univ.,Ames, IA | 25,489 | 25,448 | 84 | 47,000 | 1:1.8 |
| Kansas State Univ./Manhattan, KS | -- | 19,301 | 81 | 37,000 | 1:1.9 |
| Mississippi State Univ./Starkville, MS | 13,141 | 12,406 | 85 | 17,006 | 1:1.4 |
| Oklahoma State Univ./Stillwater, OK | 20,110 | 20,764 | 80 | 36,630 | 1:1.8 |
| Oregon State Univ./Corvallis, OR | 15,958 | 15,637 | 82 | 39,880 | 1:2.5 |
| Pennsylvania State Univ./State College, PA | 35,627 | 37,269 | 84 | 34,330 | 1:.9 |
| Purdue Univ./West Lafayette, IN | -- | 34,969 | 83 | 21,247 | 1:.6 |
| South Carolina State Univ./Orangeburg, SC | -- | 4,399 | 88 | 15,420 | 1:3.5 |
| Texas A&M Univ./College Station, TX | 40,000 | 39,163 | 81 | 55,112 | 1:1.4 |
| Univ. of California/Davis, CA | 22,569 | 21,838 | 76 | 41,230 | 1:1.9 |
| Univ. of Colorado/Boulder, CO | -- | 24,072 | 82 | 88,000 | 1:3.6 |
| Univ. of Georgia/Athens, GA | 27,000 | 27,176 | 79 | 40,000 | 1:1.5 |
| Univ. of Idaho/Moscow, ID | 10,019 | 9,444 | 70 | 18,000 | 1:1.9 |
| Univ. of Iowa/Iowa City, IA | 28,884 | 29,230 | 71 | 50,508 | 1:1.7 |
| Univ. of Maryland/College Park, MD | 35,825 | 36,258 | 94 | 28,000 | 1:.8 |
| Univ. of Massachusetts/Amherst, MA | -- | 25,216 | 78 | 36,000 | 1:1.4 |
| Univ. of Mississippi/Oxford, MS | -- | 9,639 | 81 | 11,500 | 1:1.2 |
| Univ. of North Carolina/Chapel Hill, NC | 23,006 | 23,579 | 67 | 34,000 | 1:1.4 |
| Univ. of Virginia/Charlottesville, VA | 17,404 | 17,198 | 65 | 42,100 | 1:2.4 |
| Virginia Polytechnic Insitute/Blacksburg, VA | 22,922 | 22,361 | 81 | 35,000 | 1:1.6 |
| Washington State Univ./Pullman, WA | -- | 16,532 | 81 | 22,270 | 1:1.4 |

[1]Provided by respondent. Data basis varies. Where "--" appears, there was no response.
[2]Peterson's Guide to Four Year Colleges, 1990.
[3]Where data was not provided, 1988 County and City Data Book was consulted.

The ratio of university enrollment to municipal population may provide some perspective in discussions; however, it should be noted that in some cases university enrollment may be included in municipal population and vice versa. The ratios range from 1:4.6 for Colorado State/Fort Collins down to 1:.6 for Purdue/West Lafayette. In the communities of Clemson, State College, West Lafayette, and College Park, the university enrollments exceed the municipal population.

### HOUSING

The number of housing units in each municipality and the percentage breakdown of multi-family units is displayed in Table 7. The number of total units range from 3,092 in Boone, NC to 34,000 and 35,000 units in Fort Collins and Boulder, CO, respectively. In fifty-two (52) percent of the communities, single household units outweigh multi-household units. However, multi-unit development is still significant, sometimes reaching as high as seventy-five (75) percent in the cases of Auburn, AL, and State College, PA. The trend towards multi-

## Table 7
## Available Housing and Percentage of Students Housed on Campus

| University | Municipality | Municipality[1] | | University[3] | |
|---|---|---|---|---|---|
| | | Total Housing Units | % Multi-unit | # of Housing Spaces | % of Students Housed On Campus |
| Appalachian State | Boone, NC | 3,092 | 40 | 4,400 | 40 |
| Auburn Univ. | Auburn, AL | 21,000 | 75 | 2,554 | 12 |
| Bowling Green State Univ. | Bowling Green, OH | 7,426 | 52 | 8,089 | 45 |
| Clemson Univ. | Clemson, SC | 4,945 | 38 | 7,000 | 47 |
| Colorado State Univ. | Fort Collins, CO | 34,000 | 40 | 4,670 | 23 |
| Cornell University | Ithaca, NY | 9,520 | 56 | 5,400 | 30 |
| Iowa State Univ. | Ames, IA | 12,200 | 35 | 10,000 | 39 |
| Kansas State Univ. | Manhattan, KS | 13,375 | 45 | 4,200 | 22 |
| Mississippi State Univ. | Starkville, MS | 9,184 | 22 | 4,928 | 40 |
| Oklahoma State Univ. | Stillwater, OK | 14,033 | 41 | 4,593 | 22 |
| Oregon State Univ. | Corvallis, OR | 15,362 | 48 | 3,188 | 20 |
| Pennsylvania State Univ. | State College, PA | 10,135 | 75 | 11,877 | 32 |
| Purdue Univ. | West Lafayette, IN | 5,000 | --[2] | 12,500 | 36 |
| South Carolina State Univ. | Orangeburg, SC | 4,719 | 16 | 2,194 | 50 |
| Texas A&M Univ. | College Station, TX | 19,700 | 69 | 9,770 | 25 |
| Univ. of California | Davis, CA | 14,546 | 53 | 4,200 | 19 |
| Univ. of Colorado | Boulder, CO | 35,000 | 57 | 6,000 | 25 |
| Univ. of Georgia | Athens, GA | 17,000 | 29 | 5,893 | 22 |
| Univ. of Idaho | Moscow, ID | 5,939 | 52 | 2,135 | 23 |
| Univ. of Iowa | Iowa City, IA | 19,235 | 38 | 6,300 | 22 |
| Univ. of Maryland | College Park, MD | 5,284 | 27 | 8,103 | 22 |
| Univ. of Massachusetts | Amherst, MA | 8,600 | 59 | 11,393 | 45 |
| Univ. of Mississippi | Oxford, MS | 6,000 | 50 | 3,685 | 38 |
| Univ. of North Carolina | Chapel Hill, NC | 10,482 | 30 | 6,824 | 29 |
| Univ. of Virginia | Charlottesville, VA | 16,460 | 30 | 4,698 | 27 |
| Virginia Polytechnic Institute | Blacksburg, VA | 12,131 | 66 | 8,403 | 38 |
| Washington State Univ. | Pullman, WA | 5,328 | 55 | 6,700 | 41 |

[1]Where information is unavailable, the 1980 Census of Housing, Detailed Housing Characteristics was consulted to provide a basis for discussion.
[2]Census combines the data for Lafayette and West Lafayette.
[3]On campus housing based on Fall 1988 data provided in Peterson's Guide to Four Year Colleges, 1990.

unit housing in these municipalities is reflective to some extent in overall housing trends but perhaps to a greater extent by the growth of universities and the absorption of a significant share of the accompanying housing needs by the surrounding community.

Many of the communities had difficulty estimating the number of students and staff housed within the municipal limits. Typically a high percentage of faculty and a smaller percentage of staff live within the host community. Frequently, there were other nearby municipalities and residential developments in surrounding counties where housing is also available.

Table 7 also reflects the number of campus housing spaces available to students and the percentage of the total enrollment which the university can accommodate in its residential facilities. The percentage of students which can be accommodated in university housing ranges from twelve (12) percent at Auburn University up to forty-seven (47) percent and fifty (50) percent at Clemson University and South Carolina State, respectively. Over fifty-two (52) percent of the universities in the interviewed communities house less than thirty (30) percent of the total enrollment.

In most of the universities, campus housing is primarily geared to undergraduates, particularly freshmen and sophomores. In forty-four (44) percent of the universities, freshmen are required to live on campus unless there are extenuating circumstances. At the same time, there does not seem to be a strong correlation between the schools with high undergraduate enrollment relative to graduate enrollment and the number of students housed on campus. In general, there are minimal residential facilities for graduate students because they frequently choose to live off campus. And rarely do universities provide housing to university personnel.

## SERVICE CONSOLIDATION

Service provision is often coordinated between universities and municipalities as depicted in Table 8. However, it generally occurs in the specific areas where there is cost effectiveness to both entities. The most often cited areas of consolidation between municipalities and universities were fire and sewer service.

In some cases of service consolidation, conflict arises largely because of the tax exempt status of the university. However, in most of the interviewed communities, there are fees paid or other negotiations made for specific services. Sometimes the rate of reimbursement does not cover the cost of service provision, and, in other cases, there are perceptions that payment exceeds the actual expense. Where a university is not within the municipal limits, fees are always exchanged for services provided by the municipality on a regular basis. With fire service and transit, lump sum payments are generally made. Where water

**Table 8**
**Consolidation of Services**

| Service | Consolidated Between Municipality/ University | | Other Entities Included in Consolidation[1] | | Not Consolidated | |
|---|---|---|---|---|---|---|
| | # | % | # | % | # | % |
| Police | 1 | 4 | 0 | 0 | 26 | 96 |
| Fire Protection | 20 | 74 | 4 | 15 | 3 | 11 |
| Emergency Medical Service | 9 | 33 | 10 | 37 | 8 | 30 |
| Emergency Dispatch | 2 | 7 | 4 | 15 | 21 | 78 |
| Hospital | 0 | 0 | 0 | 0 | 27 | 100 |
| Water | 10 | 37 | 5 | 19 | 12 | 44 |
| Sewer | 19 | 70 | 4 | 15 | 4 | 15 |
| Solid Waste Disposal | 1 | 4 | 0 | 0 | 26 | 96 |
| Hazardous Waste Disposal[2] | 0 | 0 | 0 | 0 | 26 | 100 |
| Electric Service | 5 | 19 | 0 | 0 | 22 | 81 |
| Streets | 0 | 0 | 0 | 0 | 27 | 100 |
| Transit | 5 | 18 | 7 | 26 | 15 | 56 |
| Court System | 0 | 0 | 0 | 0 | 27 | 100 |
| Recreation | 0 | 0 | 0 | 0 | 27 | 100 |

[1]May include county, regional, or more than the principal city involvement. May also include private agency.
[2]Only 26 communities responded to this question. The percent is based on total number responding to the question.

or sewer service is provided, user fees are assessed and capital costs may be contributed. See Appendix C.

In some communities, voluntary contributions are made by the university and paid to either the city, county, or another agency. The contributions most frequently are earmarked for fire service. Specific examples include Colorado State, Cornell, Penn State, and University of Virginia. In other communities, including the University of Massachusetts, University of Georgia, University of Colorado, South Carolina State, and Oregon State, there is no exchange of funds for fire service but there may be for other services such as transit.

In a few communities, including Boone, NC, Ames, IA, Starkville, MS, and Pullman, WA, the university collects taxes on campus which may be in the form of occupancy taxes at hotels within the university research parks, admission taxes on athletic tickets, as well as retail sales and food taxes. A portion of this tax generally reverts back to the municipality and/or the county in which the university is located. When the university taxes, reimbursements usually go into the local government's general fund and are not earmarked for specific service provision. In Auburn, the city has a two percent tax on rental properties which also becomes part of the city's general fund.

**POLICE**

In the interviewed communities, police service is generally not consolidated between the city and the university, as depicted in Table 8. For the most part, the universities and municipalities each provide their own forces with informal mutual back up agreements. Mutual back up might include the sharing of personnel during a crisis situation or investigative aid. The community of Moscow, ID, and the University of Idaho are a notable exception because there is a consolidated city university effort. The city provides all police protection to the campus. This service includes seven full time officers and two patrol cars on campus at an annual cost to the university of $290,000. A couple of cities, Manhattan, KS, and College Park, MD, have protection provided to them by a consolidated county force.

Most of the universities will contract with state police and as needed, county and city police for assistance during major events such as football games. Prince George County, which protects College Park, MD, and Charlottesville, VA, negotiate concurrent jurisdiction with the university in some areas where students live and socialize.

**FIRE PROTECTION**

Fire service generally includes response to fire calls and in some cases may include fire inspections as well as hydrant and fire alarm maintenance. The majority of the interviewed university communities are cooperatively dealing with fire service provision with the city as the primary provider to the university. In four communities, Fort Collins, CO, Ithaca, NY, Athens, GA, and College Park, MD, the county is the fire service provider to both the municipality and the university. Clemson, SC, is an exception in that it is the only interviewed community where the university provides fire protection to the city. In three communities,

Davis, CA, West Lafayette, IN, and Pullman, WA, the cities and the universities each provide their own protection.

Of the responses to this question, the fees for service range from no fee in the cases of Colorado State, Oregon State, South Carolina State, University of Colorado, University of Georgia, and University of Massachusetts to $619,000 paid by the University of Iowa. A number of universities pay in the $100,000 range. In addition, Virginia Tech in Blacksburg is assessed a set charge for each false fire alarm on campus.

Fees are primarily used for operational costs and sometimes for equipment acquisition or amortization. The fees are based on a variety of funding formulas which may include the ratio of on campus calls to city calls, the percentage of university property within the municipal limits, the assessed rate of the university property if it were on the tax roles, the actual cost for fire service provision, or in some cases, what the university chooses to contribute on a voluntary basis. In five communities, Manhattan, KS, Oxford, MS, College Park, MD, Clemson, SC, and Amherst, MA, there are fire stations located on university land. A few universities have students who volunteer their time to fire protection.

**EMERGENCY MEDICAL SERVICE**

Emergency medical service is considered mobile emergency health care where treatment is administered on the premises in a crises situation and/or where a patient is transported to a hospital for further care. Thirty-three (33) percent or nine (9) of the interviewed communities have coordinated emergency medical service between the city and university with the city providing the service. In the majority of these cases, the service is provided under the fire service contract with the individual patients also paying a fee. The counties, through the police department, fire department, or hospitals, as well as private hospitals and commercial ambulance companies, also provide a significant share of the service to approximately thirty-seven (37) percent or ten (10) of the university communities. As with the city provided service, individual patients will pay a fee for county or commercial ambulance service. In eight of the communities, service is not consolidated between the municipality and the university. However, there are informal agreements to provide back up service should the need arise.

**EMERGENCY DISPATCH**

The dispatch of emergency services is generally not consolidated between the municipalities and the universities. In seventy-eight (78) percent of the communities, the universities and the municipalities will provide their own dispatching. However, most of the communities feel that they do have the ability to switch over, communicate and coordinate with ease when the need arises. When there is a consolidated dispatch, it is primarily a county, city, and university effort with the county administering the dispatch service. A couple of exceptions include Mississippi State at Starkville and University of Idaho at Moscow. At the University of Idaho in Moscow, the dispatch is tied to the city police department and fees for this service are linked to the police contract which the university has with the city. In the

case of Starkville, the city has a centralized dispatch number and fees are collected through a countywide tax levy on the phone bills.

**HOSPITAL**

In the interviewed communities, the provision of medical care is not consolidated between the municipalities and the universities. Most of the universities have student health centers which are geared to preventive or outpatient medical care, and there are modest overnight facilities. While preventive health care programs are offered to the community, any outpatient or infirmary care is provided solely to the students. The majority of the hospital care in the communities is through either county or private community hospitals. A few of the cities, Ames, IA, Stillwater, OK, Boulder and Fort Collins, CO, have city hospitals which operate under a separate authority. Services are provided to students if the need arises. Where medical schools with university hospitals are present, the university may provide medical care needs for the community. The Universities of Iowa, North Carolina, and Virginia, as well as Washington State have full service hospitals which provide care to their students as well as municipal and statewide residents. Except for student health centers where fees are generally covered at the beginning of the school year, payment for hospital care is largely the responsibility of the individual patients.

**WATER SERVICE**

Over half of the interviewed communities have jointly arranged water service. In thirty-seven (37) percent of the communities, the municipalities are providing the primary water service to the universities. In nineteen (19) percent of the communities, a regional authority provides water to the university and the municipality. While the remaining communities do not have consolidated water service, the water lines are frequently interconnected for emergency support. When it is logistically and economically feasible, the university sometimes provides service to a remote portion of the city and vice versa. There were no cases where the university was the primary provider to the municipality. Yet, there was a time when Oklahoma State furnished all of the water service to the city of Stillwater; now, the university provides some occasional service to the city. The university felt that the water business is not within the mission of the institution, and water service became cumbersome with city and university growth.

Rates for service are based on usage. Many of the communities have reduced rates for large volume users such as universities or industries. The city of Manhattan, KS, provides water to Kansas State University which is not in the city limits. Other customers out of the city limits, generally pay between one and a half to two times the city rate; however, the city gives Kansas State the reduced municipal rate.

**SEWER**

In seventy percent of the communities, sewer service is coordinated between the university and the municipality with the municipality as the principal provider. An exception is

Pennsylvania State University, which provides sewer service to the city of State College. In fifteen percent of the communities, service is consolidated within areawide authorities which often include other municipalities and/or the county. In the remaining communities, including Clemson, SC, College Station, TX, Davis, CA, and Oxford, MS, each of the entities provides their own sewer service. It is important to note, however, that most of these communities stated that if a joint effort is presented which is beneficial to both entities, joint arrangements would be considered. For instance, the University of Massachusetts provided the land for a waste treatment plant which is operated by the city of Amherst. Clemson University will be providing sewer service to a small portion of the city which is logistically more reasonably sewered by the university. Likewise, the City of College Station and Texas A&M along with the nearby city of Bryan are studying the possibility of a joint wastewater facility.

For the most part, sewer charges paid by the universities are based on a percentage of water consumption with capital improvement costs contractually agreed upon as needed. In a few universities, there is dispute about the method of determining sewer rates, particularly when water is used for field irrigation; thus, not burdening the sewer treatment plants.

**SOLID WASTE DISPOSAL**

The disposal of solid waste includes the collection of refuse and transportation to a disposal site. In a few cases, interviewees mentioned recycling efforts in the discussion of solid waste disposal.

In ninety-six (96) percent of the communities, the pick up and transportation of waste material is conducted separately with the individual universities and municipalities generally furnishing their own equipment and personnel. In some cases, the entities may contract separately for collection services from a private hauler. Penn State and State College have coordinated the collection effort in that Penn State hires the city, as if it were a private hauler, to collect its waste. The University of Idaho and Moscow have combined efforts to contract with a private hauler under one agreement.

A few cities have their own landfills, including Oxford, MS, Iowa City, IA, and College Station, TX, which are utilized by the universities. The city of Ames, IA, operates a resource recovery plant which is available to the university for disposal and recycling efforts. In the Auburn community, the city operates a landfill which is located on university property. In the remaining communities, waste is transported to joint city/county, county, or regional landfills. Tipping fees are generally charged at the disposal sites based on the weight of the refuse.

There are some joint efforts regarding solid waste disposal which have recently been initiated. Many of the communities have begun recycling centers which the universities utilize on an informal basis, and Washington State University has a recycling center which the city residents use. The city of College Station and Texas A&M are currently studying the possibility of coordinating efforts regarding solid waste, landfills, and wastewater. The

Blacksburg community in conjunction with another city and the county have a bill in the legislature advocating a joint study of solid as well as hazardous waste disposal.

**HAZARDOUS WASTE DISPOSAL**

According to the interviewees, municipalities rarely generate hazardous wastes. When there is a need to dispose of wastes, private licensed haulers are customarily contracted. In some communities, the universities may be contacted for advice on the most appropriate disposal method.

With the research wastes of the universities, hazardous materials become a greater concern. A few of the universities are licensed to dispose of some types of hazardous wastes, and Mississippi State and the University of Iowa have incinerators for medical and research wastes. Generally, the situation will be assessed to determine if the university can handle the material. If not, a licensed private hauler will be contracted to dispose of the material.

As previously mentioned in the solid waste discussion, there is currently a bill in the Virginia Legislature advocating a joint study of solid and hazardous waste conditions and solutions. The bill is sponsored by Virginia Tech, two cities, including Blacksburg, and the county. Kansas State University and the City of Manhattan have jointly studied and drafted a plan regarding solid waste disposal; however, to this date, it has not been implemented.

**ELECTRIC SERVICE**

Electric service to the universities and municipalities is generally not a coordinated effort. In eighty-two percent of the communities, both entities separately arrange service primarily through public or private utility companies. In eleven percent of the communities, including Fort Collins, CO, Ames, IA, and Orangeburg, SC, the cities provide service to the universities. Appalachian State in Boone, NC, is the only university in the sample which provides electrical service to the residents of the municipality.

It appears that all electrical service customers are assessed a rate based on meter determined usage. The universities are normally charged a large customer or institutional rate which is lower than the individual customer rate. Some communities have expressed concern about whether the municipality can charge the university the utility tax; however, at this point, the communities have no clear decision on the matter.

**STREETS**

The question regarding streets dealt primarily with street maintenance such as sweeping, snow plowing, and minor repairs. Street maintenance is largely administered independently by the municipalities and universities. The streets on campus which are not dedicated to the municipalities are maintained by the universities with state funding. Iowa State is one case where the university maintains some of the city streets which are located within the

campus boundaries. In Corvallis, OR, the university sometimes contracts with the city for minor road improvements within the campus. Streets within the municipality are predominantly the responsibility of the cities unless they are county or state roads.

While roadway maintenance is not consolidated, there still appear to be a number of cooperative efforts regarding the streets, particularly where university and city streets join or where a roadway change will affect both entities. Signage and signalization coordination is one area where there appears to be a significant amount of cooperation. There have been cases where traffic improvements have been jointly discussed, and depending on the conditions, negotiations are frequently carried out. This has been particularly successful at Oklahoma State in Stillwater, and at University of Mississippi in Oxford. A few communities, including Auburn, AL, Clemson, SC, and Pullman, WA, have jointly funded transportation plans which address roadway maintenance as well as improvements. A few communities indicated that there is the sharing of equipment or paint for street lines or parking spaces in some cases; however, such arrangements are handled on an informal, operational and ad hoc basis. There was some discussion of the importance of communication between personnel and department heads from the two entities who deal with the roadways. There were only a couple of communities who expressed concern that their counterparts did not want to work together on transportation issues, particularly when it came to financing improvements.

**TRANSIT**

In discussing transit provision, interviewees were asked whether there was a system utilized by students and municipal residents, what type of transit system is used, who supports it, and how it is financed. In all communities, a bus system was the type of public transit discussed.

In fifty-six (56) percent of the communities, transit is not consolidated between the municipalities and the universities. In fact, in the communities of Auburn, AL, Manhattan, KS, Stillwater, OK, Moscow, ID, Starkville and Oxford, MS, there is no municipal or university system. A few of the cities, including Pullman, WA, have bus systems which also serve the university area by virtue of the city streets which are located within the main campus and the high ridership. Texas A&M in College Station has an interesting arrangement where the university shuttle does travel throughout the city to the apartment complexes; however, the system is only available to university students and staff.

The university and municipality have a joint transit system in eighteen percent of the communities, including Fort Collins, CO, Ames, IA, Davis, CA, Athens, GA, and Blacksburg, VA. For the most part, the buses will travel on campus as well as throughout the municipality. In Fort Collins and Athens, the cities own the systems, and through student fees, the universities contribute financially to the operating costs of the system. In Davis, Ames, and Blacksburg, the systems are generally entities of the cities but financially supported by both the university and the municipality as well as student fees and state and federal grants.

The remaining twenty-six (26) percent of the communities have coordinated transit systems through combined cities, county, and/or regional transit authorities. These communities include Boone, NC, Ithaca, NY, Corvallis, OR, State College, PA, West Lafayette, IN, Amherst, MA, and Chapel Hill, NC. The University of North Carolina in conjunction with the towns of Chapel Hill and Carrboro operate a joint system where the university has provided forty acres for the maintenance, operations building, and parking of the bus fleet. Negotiations have also included long term, minimal cost leases on properties to be used by students and residents for park and ride lots. In cases where there is a larger system that is not completely integrated with the campus, the university may lease shuttles from the authority or maintain its own internal shuttle system.

As previously mentioned, financial support for the systems comes from a variety of sources. Generally, federal and state monies, line items in the budgets, and student fees are involved. In addition, riders may also pay a minimal fee to use the service.

There are a few joint efforts to study the transit needs in progress at this writing. Clemson University and the city of Clemson are applying for a planning grant to study their transit options. Cornell University along with two counties and a few municipalities have made a joint grant application to try to coordinate the transit routes of that area. South Carolina State College and the City of Orangeburg have been awarded a planning grant and have secured buses. They are now jointly studying expanded service. Finally, the University of Virginia and the City of Charlottesville are studying consolidation efforts. Currently, they each run their own systems and there is some overlap in the routes.

In a few communities, particularly where there was no on campus shuttle, the need for transit service or expanded service was perceived differently by the two entities. Generally, the city would see a transit need and the university would not.

**COURT SYSTEM**

The court system is generally not consolidated between the university's and the municipality's administration. The communities are bound by the state's judicial system and the authority which is granted to the local government. In some communities, it may be the county, in others, it may be the municipality. At Clemson University, which is not within the city limits, there is a separate municipal court for the university. In any case, the jurisdiction where the offense occurred and the severity will have a bearing on which court tries the case. For the most part, the universities hear the cases regarding internal disciplinary problems, parking violations, and in some cases, moving violations. The University of Georgia and Athens are coordinating in the appeal and collection of on-campus parking fines. The city court has assumed this responsibility, and the city, accordingly, will retain the revenues.

**RECREATION**

The recreation programs of the interviewed municipalities and universities are not consolidated. Overall, the university students and staff are utilizing facilities to capacity and in most

cases, there is the indication of strong municipal recreation programs. Where university fields or facilities are unmonitored, there is informal use by residents, and of course, the city recreation areas are utilized by students of the universities.

While the programs are not consolidated, there are a number of collaborative efforts on specific projects. Some notable examples include the communities of Ames, IA, Boulder as well as Fort Collins, CO, and Oxford, MS. In Ames, the city and university jointly own the ice arena, though it is administered by the city. In Boulder, the city and university jointly own a skating rink, and in Fort Collins, the city contributed funds for economic development purposes to the university's new track. In Oxford, there are joint baseball park facilities. In a few communities, the university leases park land to the municipalities in exchange for city maintenance and operations. Examples of this arrangement can be found in Ames, IA, College Station, TX, and Oxford, MS.

For the most part, cooperation exists on an informal basis. The universities frequently will allow residents and organized groups to use on campus, monitored facilities such as pools, tennis courts, and indoor tracks when they are not at capacity. Residents will normally pay a fee to use the facilities. Fees for organized groups vary from no fee to a minimal user fee. In Clemson, SC, the university leases a relatively large parcel of land on a lake with a picnic area and playing fields to a local non-profit organization which is open to the public for a fee.

In some communities, the issue of unfair competition has surfaced in regard to non-student use of university athletic and recreational facilities such as weight rooms and bowling alleys. For this reason, some universities have a limited amount of exchange with the residents.

**OTHER CONSOLIDATION EFFORTS**

In approximately fifteen (15) percent of the communities, including Auburn, Starkville, College Station, and Pullman, the airports have been joint efforts between the municipality and the university as well as other entities. In Auburn, the university owns the airport with three governments participating in the funding. The flight center in Starkville serves varied interests. It provides a resource for the aerodynamic projects at the university, provides housing for aircraft, and has been a valuable resource in industrial recruitment efforts.

## OTHER COORDINATED ACTIVITIES OF THE UNIVERSITY COMMUNITY

There are a number of activities which communities undertake to enhance the quality of life in a community. Examples may include land use planning, technology advancement, energy initiatives, economic development activities, environmental efforts, and internship programs. In many cases, these activities are approached separately by the universities and the municipalities. However, because of the locational proximity and the impacts each entity has on the other, it may be beneficial to coordinate these efforts in some cases. Interviewees were asked if the activities depicted in Table 9 were addressed in a coordinated manner by the municipalities and the universities.

**Table 9**
**Other Coordinated Activities of the University Community**

| Activity | Do Coordinate | | Do Not Coordinate | |
|---|---|---|---|---|
| | # | % | # | % |
| Planning and Land Use Regulation | 27 | 100 | 0 | 0 |
| Economic Development Activities | 26 | 96 | 1 | 4 |
| Technology Transfer | 18 | 67 | 9 | 33 |
| Environmental Efforts | 19 | 70 | 8 | 30 |
| Energy Initiatives | 4 | 15 | 23 | 85 |
| Internships | 27 | 100 | 0 | 0 |

### PLANNING AND LAND REGULATION

All of the interviewed communities coordinate planning activities to some extent although it is largely informal and consists primarily of representation by residents who are also university personnel on the various municipal boards and vice versa. In some communities, university students sit on municipal boards as non-voting members. In addition, there are oftentimes task forces with representation from both entities dealing with specific planning issues. Many communities indicated that communication links between the campus, the municipality, the residents, and the business community are a necessary component to coordinated planning efforts.

In some communities, there are jointly funded planning studies addressing issues affecting both the university and the municipality. For instance, the city of Clemson and Clemson University recently completed a jointly funded areawide transportation plan.

For the most part, universities are exempt from local land regulations by virtue of state law. A recent Attorney General's opinion in Auburn upheld the university's exempt status when the university did not install the bufferyards required by the city ordinance. In some cases, however, the universities' governing bodies will suggest that to the extent possible, the university should comply with local land use and building regulation. When the university

is within the municipal limits it is often still zoned under one broad zoning category which includes all of the uses customarily found on the university campus. Generally, plans are voluntarily submitted as a courtesy to municipal officials. While there is coordination, it frequently leaves little discretion or legal recourse to the municipality. The main concern arises when universities purchase properties off of the main campus but within the municipal limits and do not comply with the municipal regulations.

Some communities are dealing with planning issues in seemingly unique ways. Cornell University in Ithaca conducts public meetings every six months to inform the municipal residents of planned capital projects and status of existing projects. The University of Virginia has a voluntary three way pact with Charlottesville and the county to inform the other entities of proposed activities. In addition, all three entities contribute to and utilize the same data base and are on the same planning cycle. See Appendix D.

**ECONOMIC DEVELOPMENT ACTIVITIES**

Economic development is probably the most frequently coordinated activity between the municipality and the university. In most cases, however, other entities such as the state development board, Chamber of Commerce and/or private business concerns are also involved. The university is often the largest employer in a community; thus providing economic vitality to a municipality solely by the number of people it brings in and the accompanying business activity to serve them. In many communities, representatives from both entities serve on local development boards. In addition, the university may provide marketable research, informal advice, or strengths in particular areas. Currently, the primary interest appears to be in skills pertinent to bio-tech industries.

In at least seventy-five (75) percent of the communities, the roles of the university and the local government are more formalized. Many of the communities have research parks, business incubators, and/or industrial development areas, which have evolved because of the proximity of the university. In some cases, the areas may be located on university land, and, in others, the university and the municipality have combined efforts to secure initial funding. The non-governmental businesses which locate in these areas generally will pay taxes to the local government. The recruitment of businesses to the incubator or research areas is largely a joint exercise by all involved entities. The city of Moscow and the University of Idaho exemplify this approach to economic development. The University of Iowa and Oregon State fund economic development coordinator positions which are responsible for city as well as university efforts.

Charlottesville, Amherst, State College, and, until recently, Davis, have been considered "no growth" communities. While the local business community and/or the Chamber of Commerce may undertake economic development activities, the local governments in these communities rarely get involved in this area.

## TECHNOLOGY TRANSFER

Interviewees were asked whether technological advances were shared between the university and municipality. The discussions centered around ways to increase efficiency and effectiveness. In two-thirds of the interviewed communities, technological advances of the university were perceived to carry over to the local government primarily in the form of transferred information. Generally, this transfer is an informal arrangement which is a function of the individuals or departments involved and arises largely out of university research efforts. The subject areas most frequently coordinated between the entities include computerization, engineering with a strong emphasis on water quality, and agriculture.

While some respondents do not perceive coordination in this area, they do see potential coordinated efforts. In a few cases, the research generated information is more applicable to the state or to industry; therefore while contact with the local government is not direct, there still may be effects derived from information transferred at a different level.

## ENVIRONMENTAL EFFORTS

The conservation of natural resources is frequently addressed by universities and municipalities. In seventy (70) percent of the interviewed communities, environmental efforts are coordinated. However, in many cases, these efforts are not official actions of the entities involved but actions of interested individuals who happen to be affiliated with the municipality or the university.

Environmental topics most frequently discussed include recycling and waste management as well as air and water quality. The universities are often consulted regarding these issues; however, the municipalities, in some instances, would like to see more pro-active involvement by the university. In many communities, the municipality has activated recycling programs in which the university participates but does not contribute funding. Students and university personnel in a few communities have instigated recycling projects; but, generally, they are on an ad hoc basis. Some communities noted that the state requires environmental impact studies from the university for campus construction; and a few municipalities require impact studies for certain types of municipal development.

## ENERGY INITIATIVES

Respondents were questioned regarding cooperative efforts for energy conservation or generation. In approximately eighty-nine (89) percent of the interviewed communities, energy efforts are addressed separately by the university and the municipality. To some extent, however, the coordinated public transportation efforts in a few communities address energy issues. In Corvallis, the city and the university jointly consulted with the local power company to retrofit all exterior lighting to a more efficient and less expensive fixture type. The resource recovery program funded by the city of Ames is a notable municipal effort which has recycling as well as power generation capabilities. The university is a major

participant in this program paying on the volume of material it brings to the facility. The city of Davis is a leader in setting energy standards for new development. However, according to the university spokesperson, these standards are more difficult to apply to university buildings. In two particular joint efforts involving Cornell in Ithaca and University of Maryland in College Park, the political battles associated with proposed power or co-generation plants caused the communities to steer away from this type of effort.

## INTERNSHIPS

The practice of hiring university students by the local governments benefits the students, university, and the employer. Internship programs are designed to apply what the student has learned in the classroom to the working environment. In addition, it allows the student opportunity for employment experience in his or her interest area. Local governments can benefit from this assistance by hiring students at minimal cost to work for the municipality for a specified period of time.

In all of the interviewed communities, the municipalities sponsor internships. However, this effort is approached at the departmental level on a case by case basis. Depending on the needs of the employer and the requirements of the student's educational program, students may be employed to work on specific studies or, on a broader basis, with everyday activities. Public administration, planning, architecture, engineering, and parks/recreation programs are the most frequently tapped sources for student assistance. At Oregon State, each college has a coordinator who works with agencies throughout the state, including the municipalities, to place students in internship programs.

## OTHER AREAS OF COOPERATION

Other areas frequently mentioned as a coordinated effort between the university and the municipality include cultural and/or festival activities. The programs and activities sought may be a reflection of the student as well as the community population. In some cases, the efforts may be joint to the extent of contributing funds and advertising.

## MUNICIPALITY AND UNIVERSITY ISSUES

While relationships between the municipalities and universities are generally favorable, there are also issues which arise out of the unique university community arrangement. Respondents were asked whether the following topics were considered issues in their community. See Table 10. The purpose of these questions is to better understand the problems inherent in city/university relationships and to learn what other communities may be doing to address these issues.

**Table 10**
**Specific Municipality/University Issues**

| | Issue | | No Issue | |
|---|---|---|---|---|
| | # | % | # | % |
| Parking | 27 | 100 | 0 | 0 |
| Traffic Congestion | 22 | 82 | 5 | 8 |
| Parking and Traffic Violations | 12 | 44 | 15 | 56 |
| Street Upkeep | 0 | 0 | 27 | 100 |
| Student Housing Impact On Neighborhoods | 25 | 93 | 2 | 7 |
| Student/Community Relations | 10 | 37 | 17 | 63 |
| Univeristy/Community Relations | 11 | 41 | 16 | 59 |
| Land Use Planning and Zoning | 8 | 30 | 19 | 70 |
| University Expansion | 7 | 26 | 20 | 74 |
| Childcare | 6 | 22 | 21 | 79 |
| Recreation Opportunities | 2 | 7 | 25 | 93 |

### PARKING

In all of the interviewed communities, the shortage of parking spaces is considered a problem. For the most part, the university will provide parking for its students and staff at minimal cost and the municipality will have metered spaces or timed lots. The rate structure, monitoring of spaces, and violation fines are generally handled separately by the entities.

Development increasingly consumes available parking within these communities. However, the major concern related to parking stems from the location of the spaces. While the university may have the spaces to accommodate students and staff, they are frequently remote generating a need for a reliable shuttle system with frequent stops. In many communities, the commercial areas already are suffering from inadequate parking. Therefore, if university affiliates use the municipal spaces because they are closer to the main campus, little parking is left for customers or visitors to the city. In addition, residential streets with easy access to campus often become cluttered with cars which could be using university spaces or commercial spaces if they are available. The communities also are grappling with the issue of parking at student apartments. In many cases, there are three or four students, the majority with cars, living in an apartment or a converted home without

adequate parking creating a major concern within surrounding single household neighborhoods.

Communities are trying to address the parking issue in a variety of ways. However, in most cases, the problems are addressed separately. An exception is the University of Virginia and Charlottesville which are jointly studying the issue. Universities and municipalities continue to assess the number of spaces needed and available land and try to increase the number of spaces as need arises and as space allows. In addition, many communities are looking at remote parking lots with improved transit capabilities. To encourage the use of remote lots on campus, some universities have substantially increased fees for spaces adjacent to the main campus buildings and provide free or low cost remote parking. At the University of North Carolina, student residents within a two mile radius of campus are not sold campus parking permits; however, exceptional transit, sidewalk, and bikeway systems compensate for much of the inconvenience which may occur otherwise.

In an attempt to provide stronger enforcement, municipalities and universities have increased the parking violation fines. Where fine structures are not comparable between the entities, the one with the lower fine will frequently have a disproportionate share of violations. Bowling Green, Corvallis, and Charlottesville have instituted a residential parking permit system to alleviate some of the conflict which occurs in neighborhoods adjacent to campus. In addition, many communities are reassessing the parking space requirements within their zoning regulations to address parking problems associated with student apartments. Iowa State and Penn State have aided in the off campus effort by allowing students who live off campus to store vehicles in remote areas on campus.

**TRAFFIC CONGESTION**

In approximately eighty-two (82) percent of the interviewed communities, traffic is perceived as a problem. Because of the relatively small size common among university communities, traffic congestion arises as an issue largely at the beginning and end of the working day and on special event days such as sporting events or festivals. In addition, concern arises when one entity closes a street increasing problems in the other entity's jurisdiction.

A few communities have taken a broad approach to this issue by addressing it in terms of roads, transit, bikeways, sidewalks, and parking, as well as land use. Chapel Hill is a particularly good example of this approach. Other communities are in the process of studying traffic-related issues or have recently completed joint studies of particular traffic issues, including Auburn University/Auburn, Clemson University/Clemson, Texas A&M/ College Station, University of California/Davis, and University of Georgia/Athens. Informal communication between the two entities frequently occurs when both are affected by a problem. Where pedestrian, particularly student, safety is an issue, the entities are more inclined to jointly fund a project. Davis, Athens, and Oxford have recently completed some jointly funded street improvements. In Athens, the city has passed a "no stopping" ordinance at a dangerous location adjacent to campus where cars until recently dropped

off passengers. As the passengers are largely campus bound, campus police enforce the ordinance. In the communities of Fort Collins and State College, there is some ongoing dialogue relating to staggered work hours to alleviate some of the traffic congestion concerns.

**PARKING AND TRAFFIC VIOLATIONS**

While there is major concern about parking and traffic, the violation of the regulations particularly in terms of conflict between the entities is not a major issue. Generally, the municipalities and universities handle these problems separately. In many communities, fines and enforcement have recently been stepped up particularly in terms of parking. Yet, in Boone, the maximum five dollar parking fine is not sufficient to deter violators. Still, while most communities would prefer no violations, it does provide some revenue.

**STREET UPKEEP**

There seems to be little at issue between the municipality and the university when discussing street upkeep. Generally, the concerns are dealt with separately or on an ad hoc basis as the need arises. In the College Station community, the university shuttle was creating some wear on the municipal streets. To address this situation, the university changed to a less damaging tire on its shuttles. Funding for street improvements and upkeep was also mentioned as a concern in a few communities.

**STUDENT HOUSING IMPACT ON NEIGHBORHOODS**

In ninety-three (93) percent of the communities, the impact of off campus student housing is perceived as a major issue. Rental housing is largely a function of student population above and beyond dormitory capacity on campus. This housing demand causes development pressures on the surrounding community. Another common concern is the conflict in lifestyle types which may be due in part to age differences. This is particularly evident when student rental housing encroaches into owner occupied housing areas. Respondents mentioned other issues associated with off campus student housing including: overcrowding in apartments, parking shortage, noise, and alcohol abuse. In many communities, the problems seem to be elevated at the beginning of the school year when incoming students are not yet aware of the municipal regulations and the acceptable student behavior. As part of the implementation of the University of Maryland's Campus Housing Policy and Initiatives, the university is addressing off campus housing in terms of negative impacts on single household neighborhoods. Furthermore, the university is adopting acceptable behavior standards and will be enforcing the standards in on and off campus housing. In addition, the university will work with the city and county to develop goals regarding student housing location. See Appendix E.

The issue of multi-unit encroachment into single unit developments has been addressed by some municipalities taking the stance that the city is not responsible for university housing overflow. In many communities, zoning regulations have become more restrictive to ensure

that single household areas are better protected. At the same time, communities are exploring options in terms of increasing housing stock. There do not appear to be many on campus housing increases planned, though a few universities are discussing allowing private developers to lease or buy university land for student housing development. There are a few developments of this type on the University of California/Davis campus.

The zoning ordinance is the primary regulatory tool addressing the overcrowding and parking shortage issues. Most of the communities sampled put limitations on the number of unrelated persons per dwelling, and a few have recently decreased the maximum numbers. The problem which all communities face, to some extent, is how to enforce the regulations. Enforcement is usually handled on a complaint basis with city officials relying on neighbors for information.

Parking at student apartments is a major topic on a number of community planning board agendas particularly when regulations have not been revised to address the increasing number of cars per student dwelling. A few communities envision that by improving transit service, and encouraging pedestrian and bike traffic, the issue could be alleviated to some extent.

Disorderly conduct from student housing areas is a problem in most of the communities particularly when the housing is in close proximity to single household areas. For the most part, it is more disturbing in the late evening hours when persons may be trying to sleep. In many of the communities, a noise ordinance has been adopted which is enforced by the police. Once again, enforcement is difficult and the municipality must rely on residents to inform the police when a problem exists.

The abuse of alcohol in student housing especially in conjunction with large parties was mentioned as a concern by many of the interviewed communities. The neighbors frequently complain about inappropriate and reckless behavior at student parties, especially where alcohol is served. Some relationship between alcohol use and noise and litter also was cited. In many communities, governmental agencies, the university, and some private organizations are increasing efforts to inform the students of the consequences of alcohol abuse.

In an effort to address some of the issues in the early stages, some municipalities contribute information to the university housing office and work with landlords and tenants to inform them of municipal housing policies. Ames and Iowa City have strong rental housing codes wherein rental permits are required largely to certify the health and safety of units. The permits must be renewed annually in Ames, and every two years in Iowa City. Permit fees help defray the cost of inspections and enforcement. This system requires landlord accountability and an informed tenant. The University of Maryland and College Park are studying the possibility of a coordination effort to inform students of their responsibilities as citizens, license group homes to ensure compliance with the number of people requirement, implement a parking control and towing program, and provide ombudsman or mediation services regarding student conflicts.

Similar issues often are mentioned with reference to off campus fraternity and sometimes sorority houses due to the frequent socializing of these organizations. In order to alleviate some of the burden on community residents, a few universities, including Auburn University and Virginia Tech, have moved fraternity/sorority housing back to campus.

**STUDENT/COMMUNITY RELATIONS**

The responses to this question about student/community relations were similar to the responses about the impact of student housing on neighborhoods. This question, however, is intended to look at the relationships from a broader perspective. In sixty-three (63) percent of the interviewed communities, the relationship is not at issue. Students contribute substantial amounts of time to volunteer service projects in these communities and provide input on local government boards and in community organizations such as the Chamber of Commerce. The business communities rely on the students because they make significant contributions to the economy in terms of goods and services purchased. Moreover, the students frequently are employed by local merchants.

For the most part, the problems discussed relate to the previously mentioned concerns under the impact of student housing. These problems include encroachment of multi-household development into single household areas, noise, parking, rowdiness, and alcohol abuse. In most cases, the different perspectives and lack of sensitivity to the needs of each other are responsible for the issues which surface. In a few communities, racism has surfaced as an issue with minority students accusing the communities of discrimination. At this point, the communities are still wrestling with the issue of discrimination.

**UNIVERSITY/COMMUNITY RELATIONS**

For the most part, communities see the university/community relationship as positive. This positive relationship has not always been the case; however, better communication links have improved relationships. In some communities, the communication link has been formalized, providing some assurances to each of the entities by putting them on common ground in terms of planning efforts. Some examples of formalized communication links include University of California/Davis, University of North Carolina/Chapel Hill, and University of Virginia/Charlottesville. Still, there are certain aspects of the relationships in most communities which are perceived as needing improvement, and many communities are just beginning to address concerns which have been brewing for some time.

In a few communities, the municipality sees the university as not working with the community to the extent that it should given the support that the city must provide. This concern originates from a financial as well as a communication standpoint and relates particularly to service provision. Another conflict which surfaced in the discussions involved the business community and the university. Local merchants feel that they are faced with unfair competition from the university largely in terms of retail sales. In a few instances, this concern arose when the university established business and research parks which

sometimes have public hotels and restaurants. In turn, some of the universities have established policies regarding the provision and taxing of goods, services, and property which are not directly or substantially related to the university's mission. Oregon State recently has established guidelines, an approval process, and a review mechanism for commercial activities on campus. See Appendix F.

On the positive side, the university is often seen as the major contributor in terms of the economic base of the municipality as well as cultural and sporting activities. The individuals associated with the university are significant contributors through their efforts in various community activities. In addition, a relatively large portion of the municipality, in most cases, is composed of university affiliates who contribute to the tax base and other economic development efforts of the surrounding community. The respondents frequently inferred that given a community with or without the university, residents would overwhelmingly choose in favor of university presence.

**LAND USE PLANNING AND ZONING**

In seventy (70) percent of the interviewed communities, land use and zoning are not perceived as a major issue between the municipality and the university. Where there is mutual concern on a planning issue, joint efforts frequently will be conducted, and, in many communities, university affiliates participate on community planning boards.

In some communities, the state requires environmental impact studies on university developments, and the state building code is comparable to the municipal code. Generally, however, the university is exempt by state law from complying with local zoning regulations. Even with the exemption, if a university is located within the municipality, it is still frequently zoned, but under one "university" district which allows all uses common to a campus. In many cases, the university will submit plans to the municipality as a courtesy and attempt to comply with city regulations to the extent possible. In Boone, if development occurs within one hundred (100) feet of the town/university boundary, the university will comply with local regulation. In some communities, if the university acquires additional properties which were previously on the tax roles, the university will comply with local development regulations. As previously mentioned, the universities and municipalities at Davis, Boulder, Chapel Hill, and Charlottesville, have written agreements which formalize the process of notice and approval for capital plans. In addition, where concurrent planning cycles and data are utilized, as in the case of Charlottesville, findings and plans are more likely to reflect the goals of both entities.

Disagreements arise when one entity's actions negatively affect the other. In the communities where communication is strong, the affected party generally will have some mechanism to negotiate a compromise solution. In other communities, there is a sense of helplessness when it comes to disagreements with a state institution. There is also a concern on the part of some municipalities with many university stances not to provide additional on-campus housing. That position, in turn, increases the multi-unit development pressures on the municipalities. Some communities feel they are completely on their own

in this regard and have taken a stronger approach by restricting the location of unwanted development. The development continues to occur, although further from campus, which intensifies the traffic and parking problems.

**UNIVERSITY EXPANSION**

Seventy-four (74) percent of the communities do not perceive a problem with the university's physical expansion. Generally, the universities have expansion potential on properties which are currently in their possession. Furthermore, most of the universities do not appear to be in acquisition phases at this time. At Oregon State, a boundary line beyond which the university cannot expand has been established by the Board of Higher Education.

Concern does arise when the universities begin acquiring properties which were previously on the tax roles as the tax base is then affected. Some communities have worked out arrangements for taxing to continue on state owned properties if they are not used for educational purposes. When development does occur on campus, there is also a concern as to how it will influence traffic patterns and parking within the community; thus, furthering the need for the sharing of plans.

Most communities are more concerned with enrollment expansion rather then physical expansion because of the accompanying housing, service provision, traffic, and parking problems. At the same time, some communities see the enrollment increase as a benefit to the economic development of the area. In Auburn, for example, the respondent indicated that the community is disappointed by the enrollment cap.

**CHILDCARE**

In the majority of the communities, childcare is considered an issue to the extent that there is generally not enough quality care. However, for the most part, the communities do not see it as issue between the municipality and the university. In approximately half of the communities interviewed, the university does have childcare facilities, but, generally, they are utilized only by university affiliates because of limited capacity. For the most part, the facilities are linked to the education and/or nursing programs at the university.

Where universities have decided against providing childcare arrangements, it usually has been determined that there are an adequate number of providers within the community. Furthermore, because of the concern with unfair business competition as well as the liability involved, some universities have steered clear of this activity.

In at least six communities including Bowling Green, Fort Collins, Starkville, Stillwater, Moscow, and Blacksburg, the issue is currently being discussed and/or studied. While this issue is generally addressed independently, the communities of Starkville and Moscow are looking at joint city/university possibilities for childcare.

## RECREATIONAL OPPORTUNITIES

Communities generally do not see recreation as a source of contention between the two entities. Where an issue was indicated, it was an internal concern and generally related to a need for additional facilities. For the most part, recreational opportunities are provided separately, although there are frequent informal interchanges. In some cases, university facilities are open to municipal residents and university affiliates often utilize municipal facilities. In Ames, Fort Collins, Boulder, and Oxford, the municipalities and universities have combined efforts and funding to develop some major recreational facilities which are beneficial from a recreational as well as an economic development standpoint.

## JOINT CITY/UNIVERSITY ORGANIZATION

Seventy-eight (78) percent of the interviewed communities have established an on-going organization to address matters which are unique to the university community. The composition of the majority of these organizations consists of approximately six to twelve persons. Generally, representation includes the university president or chancellor, the mayor, city administrator, governing body representation, and pertinent department heads, which generally include community relations, finance, physical facilities, and planning. In some communities, there is also student representation on the committee. Frequently representatives from other levels of government and the business community, particularly the Chamber of Commerce, also participate. In the communities where no formal arrangements exist between the entities, interaction continues to occur with informal meetings generally arranged on an ad hoc basis to discuss specific topics.

Meeting agendas vary. Some groups deal with specific topics. Others take a more formalized approach and annually present their plans and projects for the coming year. Some organizations operate under both approaches. The specific topics frequently relate to infrastructure needs, economic development, planning, and housing. When a formal organization is established, there is generally a mechanism to discuss any and all concerns and opportunities relating to the university community.

As part of the efforts in Ithaca, Davis, and Charlottesville, updates of capital plans and other status reports are presented at the meetings and in some cases to the public. This procedure gives notice as well as the opportunity for input and discussion. The University of Virginia/Charlottesville appears to have been particularly successful in setting up the responsibilities of the city, university, and the county in regards to plans and notice.

The contacts which develop from the formalized organization frequently lead to informal discussions and the exchange of ideas between the staff of the two entities. While the respondents appear to appreciate the formal organization's efforts, there was an indication that most of the joint efforts are actually carried out at the staff level so the informal links are also crucial.

In a few cases, the formal approach to the city/university organization has arisen from earlier conflicts where there was no mutually acceptable forum for addressing issues. For the most part, communities perceive that the organization has had a positive effect on municipal/university relations. However, in one community which has a joint committee, the respondent indicated that, while the concept is admirable, it brings to the table issues which are difficult or untimely to solve. This dialogue creates frustration on the part of committee members as well as the public which scrutinizes the group's activities.

## ADDITIONAL OBSERVATIONS AND COMMENTS RELATING TO COOPERATIVE VENTURES AND UNIVERSITY/MUNICIPAL RELATIONS

Respondents were asked if there were any additional comments or observations regarding university community issues and opportunities which other communities might consider. Some of the more notable comments of the interviewees are listed below:

- "They are willing to create problems and then tell us how to solve them. They need to be aware of the impacts of their actions, and if necessary, contribute financially to the solutions."

- "Communities need to achieve a sense of equity before they can jointly tackle problems. This is difficult on small communities who are financially inferior and have limited revenue sources."

- "University towns are different, the staffing and educational levels are higher, and performance expectations are elevated."

- "The attitude of the senior administration is critical to positive relations."

- "Be selective of those areas where cooperation can occur and participate to see it [the cooperative effort] through."

- "When people meet each other face to face, the community works well."

- "It is important to keep communication lines open at the operating level."

- "Remember that there is no one best way to achieve progress, but there are many steps which can be taken to move in the right direction."

- "A major industry works with the community, this one is withdrawing."

- "Problems essentially relate to the legal issues associated with joint rights and responsibilities of multiple governmental units working on a single project."

- "The key elements in the relationship are the individuals involved."

- "The university should be more accountable for its actions."

- "Some tension is healthy in order to foster the goals of the town and the university."

- "We have to make some decisions regarding growth. Development is not going to leave town, it is just going to go elsewhere within the area."

- "The missions are different. The university has a statewide responsibility; the city needs to meet the needs of the residents."

- "Some determination has to be made as to what is taxable."

- "There are many differences in perspective. The university is seen as a Goliath, so there is resentment."

- "City folks are able to take advantage of state taxpayers' efforts."

- "If most people here had a choice of living in a university versus a non-university city, they would choose the one with the university."

- "Each of us have our own agendas, but, if something comes up which is mutually beneficial, we will work together.

## CONCLUSION

Cities and universities are working together in a variety of ways. However, the efforts are specific and pursued primarily when a clear perception exists that the outcome will be beneficial to both entities. For the most part, the interviewed communities indicated that concentrated joint efforts in a few key areas are more manageable than broad base programs and likely to be financially supported by both entities.

A basic problem that surfaces from the interviews relates to the different missions and responsibilities of the respective entities. With the university, the responsibility is statewide, while the municipality is accountable to the local community. Basically, however, both entities have similar goals for themselves and the community as a whole, but the priority level is frequently different.

Service consolidation efforts are frequently ad hoc and arise out of financial necessity. Some ot the more creative efforts are less concrete and center around methods of advancing long term dialogue.

Both city and university officials indicated that each entity must be aware of and sensitive to the implications of their individual actions. The presentation of plans, including capital plans, and growth projections are crucial to adequate land use and facilities planning by both the university and the municipality. Information exchange as well as a shared vision of the community's potential is essential to a good working relationship. For this reason, communication emerges as the major tool in addressing both the issues and opportunities which affect the university/municipality relationship.

# APPENDICES

# APPENDIX A

## A STUDY OF
## SERVICE PROVISION AND ADMINISTRATIVE PROCEDURES
## IN SELECTED UNIVERSITY COMMUNITIES:
## A TELEPHONE QUESTIONNAIRE

SPONSORED BY
THE CONSOLIDATION SUBCOMMITTEE OF THE
JOINT CITY OF CLEMSON/CLEMSON UNIVERSITY COMMITTEE

WITH THE ASSISTANCE OF
THE STROM THURMOND INSTITUTE OF GOVERNMENT AND PUBLIC AFFAIRS
AT CLEMSON UNIVERSITY

1990

I. UNIVERSITY PROFILE:

1. Name of Institution: _____

2. President or Chancellor: _____

3. Contact Person(s) and Title (s): _____
_____

4. Address: _____

5. Phone: _____

6. Date university established: _____

7. Is main campus located within the municipal boundaries?

Yes _____ No _____

If not, proximity to municipality: _____

8. University acreage: _____ Main campus acreage: _____

9. Full time student enrollment: _____

Undergraduate Students: _____ Graduate Students: _____

10. Number of students living in University owned housing:

Undergraduate: _____ Graduate students: _____

11. Are all university owned units located on main campus:

Yes _____ No _____

12. Are fraternity/sorority houses located on campus:

Yes _____ No _____

13. If fraternity/sorority houses are privately owned, number of students living in fraternity/sorority housing on campus not accounted for above (in question 10): _____

14. Number of faculty and staff: Faculty _____ Staff _____

15. Number of faculty and staff residing in university owned housing: _____

16. Number of faculty/staff residing in principal municipality? (percentage is sufficient) _____

17. If the university does not pay taxes to the municipality, are any payments in lieu of taxes made to the municipality?

Yes _____ No _____

II. CITY PROFILE:

1. Name of municipality: _____

2. Mayor and/or city administrator/manager (principal city official): _____
_____

3. Contact Person(s) and Title(s): _____
_____

4. Address: _____

5. Phone: _____

6. Date of municipal incorporation: _____

7. Municipal acreage:_____ Tax exempt municipal acreage:_____

8. Number of acres within municipal boundaries which are university held: _____

9. Character, type of land uses, and condition of area surrounding university campus: _____
_____
_____
_____

10. Municipal population (latest estimate and year): _____
_____

11. Estimated number of students residing within municipal limits (do not included students living in university housing):
_____

12. Number of housing units in municipality, excluding university owned housing: _____

Single household units:_____ Multi-household units:_____

13. Are any payments made to the municipality by the university in lieu of taxes?

Yes _____ No _____

APPENDIX A (CON'T)

III. SERVICE PROVISION:

| | Provided By | Provided To | Cooperative Effort | Share of Costs & Payment Method |
|---|---|---|---|---|
| 1. Police | | | | |
| 2. Fire | | | | |
| 3. Emergency Medical | | | | |
| 4. Emergency Dispatch | | | | |
| 5. Hospital | | | | |
| 6. Water | | | | |
| 7. Sewer | | | | |
| 8. Solid Waste | | | | |
| 9. Hazardous Waste Disposal | | | | |
| 10. Electric | | | | |
| 11. Streets | | | | |
| 12. Transit | | | | |
| 13. Court System | | | | |
| 14. Recreation | | | | |
| 15. Other (Please Specify) | | | | |
| | | | | |
| | | | | |

IV. OTHER POTENTIAL AREAS FOR COORDINATION:

| | Do Coordinate | Do Not Coordinate | Further Explanation |
|---|---|---|---|
| 1. City Planning and Zoning | _____ | _____ | _____ |
| 2. Economic Development Activities | _____ | _____ | _____ |
| 3. Technology Use | _____ | _____ | _____ |
| 4. Environmental Issues | _____ | _____ | _____ |
| 5. Energy Initiatives | _____ | _____ | _____ |
| 6. Internships | _____ | _____ | _____ |
| 7. Other (Please specify) | _____ | _____ | _____ |

V. SPECIFIC CITY/UNIVERSITY ISSUES WHICH ARE BEING OR HAVE BEEN ADDRESSED:

| | Issue | Not An Issue | Solutions |
|---|---|---|---|
| 1. Parking Space Shortage | _____ | _____ | _____ |
| 2. Traffic Congestion | _____ | _____ | _____ |
| 3. Violations of Parking and Traffic Regulations | _____ | _____ | _____ |
| 4. Street Upkeep | _____ | _____ | _____ |
| 5. Impact of Off Campus Student Housing on Neighborhoods | _____ | _____ | _____ |
| 6. Student/Community Relations | _____ | _____ | _____ |
| 7. University/Community Relations | _____ | _____ | _____ |
| 8. Land Use and Zoning | _____ | _____ | _____ |
| 9. University Expansion | _____ | _____ | _____ |
| 10. Childcare Provision | _____ | _____ | _____ |
| 11. Recreation Opportunities | _____ | _____ | _____ |
| 12. Other (Please Specify) | _____ | _____ | _____ |

VI. JOINT CITY/UNIVERSITY ORGANIZATION

1. Is there a formal, joint city-university committee or organization established to address both issues and opportunities for this community?

   Yes _____ No _____

2. Contact person from joint city/university organization:
   _____

3. Committee composition: _____
   _____
   _____

4. How often does the organization meet? _____

5. Has this organization had a positive affect on city-university relations?

   Yes _____ No _____

VII. SPECIFIC COOPERATIVE EFFORTS OR JOINT PROJECTS. PROBLEMS OR PITFALLS TO BE AWARE OF WHEN CONSIDERING COOPERATIVE VENTURES.

Joint
City
University
Committee

POST OFFICE BOX 148
CLEMSON, SOUTH CAROLINA 29633
(803) 653-2010 or 656-3413

CLEMSON
UNIVERSITY

January 4, 1990

Dear [Mayor]/[University President or Chancelor]:

The Joint City/University Committee for the City of Clemson, South Carolina and Clemson University are examining city/university service arrangements employed in other university communities. The purpose of our study is to look at other communities' joint efforts to determine if the arrangements might be helpful to our university community.

We are questioning via telephone approximately 25 universities and the corresponding municipalities. The university communities were chosen based on municipal population/student enrollment ratio, known cooperative efforts, or other factors which interested the Joint Committee. We are requesting that your [municipality]/[university] participate in this effort and we are contacting the [university]/[municipality] to ask them to do the same. The Strom Thurmond Institute at Clemson University, a public policy and research institute, is conducting the questionnaire by telephone. We expect the questioning to take approximately fifteen minutes. The attached short form of the questionnaire summarizes the type of questions which will be asked.

Please let us know if you will participate in the study and if so, the person or persons we should contact with phone numbers and preferred contact times. If you do not want to participate, we would appreciate your notifying us so that we may substitute another university community. Feel free to call Donna London at (803) 656-4700 with this information or use the enclosed, stamped envelope. We would appreciate your response by January 19, 1990, if possible.

We appreciate the time and effort involved in responding to a questionnaire. Once the results are compiled, we will share this information with you.

Sincerely,

Max Lennon, President
Clemson University

Larry W. Abernathy, Mayor
City of Clemson

5. SPECIFIC ISSUES WHICH THE UNIVERSITY MAY HAVE ADDRESSED AND SOLUTIONS:

| | |
|---|---|
| Parking Space Shortage | Parking and Traffic Violations |
| Traffic Congestion | Student Housing Impact On Neighborhoods |
| Street Upkeep | Student/Community Relations |
| Land Use/Zoning | University/Community Relations |
| University Expansion | Recreation Opportunities |
| Childcare | Other |

6. JOINT CITY/UNIVERSITY ORGANIZATION:

   Is there a formal joint organization to address issues/opportunities, committee composition, how often do they meet?

7. SPECIFIC COOPERATIVE EFFORTS. PROBLEMS OR PITFALLS TO BE AWARE OF WHEN CONSIDERING COOPERATIVE VENTURES.

CORNELL UNIVERSITY NEWS
News Service Village Green 840 Hanshaw Road Ithaca, NY 14850 (607) 255-3091

APPENDIX C

For further information: Warren Brown
office -- (607) 255-8399
home -- (607) 257-6695

David Allee
office -- (607) 255-6550
home -- (607) 257-6352

David Kay
office -- (607) 255-2123
home -- (607) 273-2206

DIFFICULT TO COMPARE UNIVERSITIES' PAYMENTS TO LOCAL GOVERNMENTS, STUDY SHOWS

ITHACA, N.Y. -- It is difficult to make direct comparisons of payments by colleges and universities to local governments because the underlying circumstances vary so widely, according to a new national study by the Cornell Institute for Social and Economic Research (CISER).

The study also revealed that none of the institutions of higher education or local governments covered ''appears to systematically and comprehensively collect and organize information'' about payments that the institution makes locally for services such as water and police protection or for taxes.

Across the country, discussions of such payments ''have been held in what amounts to an information vacuum,'' according to the study, which was conducted by three researchers at Cornell University. ''This report presents the most comprehensive data base of its type that has been gathered in over two decades.''

The study covered Colgate University, Cornell University, Dartmouth College, Iowa State University, Michigan State University, Purdue University, State University of New York at Buffalo, Stanford University, University of Chicago, University of Massachusetts, University of Michigan, University of Pittsburgh, University of Rochester, West Virginia University and Yale University.

The 15 institutions were chosen ''to capture aspects of the diversity in university - local government fiscal relations stemming from public versus private control of the university and the size of community,'' the study said.

Two of the researchers have recommended conducting a second study using all 92 institutions that grant doctoral degrees and that had total current funds expenditures

-more-

(4/19/88 36/BMG)

of more than $100 million in 1982 because such a study would be more likely to reveal patterns.

The study ''confirmed my expectations that this is an area worth digging into,'' asserted Professor David J. Allee of Cornell's Local Government Program. The agricultural economist conducted the research with Warren Brown, research associate for CISER, and with David Kay, a research support specialist in the Department of Agricultural Economics who also is a member of the Local Government Program. CISER is an independent professional research organization of more than 300 social science faculty at Cornell.

Allee said he would like a future study to examine the different kinds of tax-exempt property and the kinds of services they need, pointing out during an interview, for example, that ''chipmunks in a park use fewer services than students on a campus.''

According to the study, interest in fiscal relations between institutions and local governments generally is stimulated by the question of whether a university or college is contributing its ''fair share'' to local government revenue.

''There's material in there to bolster any case'' on whether schools do or do not pay their ''fair share,'' Allee said.

Colleges and universities are among the kinds of institutions granted tax exemptions because they provide many kinds of public benefits. All states exempt colleges and universities from taxes on real property used for educational purposes. Not only do such exemptions shift the overall tax burden to the rest of the taxpaying community, but the institutions put demands on local government services that taxpayers must underwrite.

The institutions often respond to criticism of this situation by pointing out that they do many things for the welfare of the surrounding communities, including paying for certain services such as electricity or fire protection and making other payments in lieu of taxes that go beyond any legal obligations.

A 1969 study by the American Council on Education said that 17 percent of 2,300-plus colleges and universities surveyed paid taxes of some kind to a local municipality, and an additional 17 percent made some kind of equivalent cash contributions or payments in lieu of taxes.

The Cornell researchers noted that their study focusses almost entirely on direct monetary payments by institutions to local governments, and thus does not consider the effect on local businesses of spending by students or university employees, the

-more-

cultural environment the institutions create, and the institutions' impact on the local job and housing markets.

The report's 16 tables and three appendices go into great detail, outlining total cash transfers from each institution to its local government, the fiscal context in which the transfers occur, and the institution's expenditures for all services it provides internally as well as its expenditures for each category of service. Thus:

- Total cash transfers ranged from $4.11 million by Stanford to $154,353 by Colgate.
- Property taxes paid ranged from about $1 million by Dartmouth and Yale to nothing by eight institutions.
- Payments made directly for specific services ranged from $3.67 million by the University of Michigan to $102,259 by Colgate.
- The highest amount in the category of other cash payments was $1.29 million by Stanford, while 11 reported no such payments.

Other tables note the cost of non-governmental services and set the figures into perspective by expressing them in terms of the institutions' scale of operations as measured by enrollment, total current fund expenditures and current replacement value of buildings:

- Expenditures per student range from $402 for the University of Chicago to $33 for Iowa State.
- Service expenditures per $1,000 of total current fund expenditures range from $14.96 for West Virginia to $2.65 for Iowa State.
- Expenditures per $1,000 of current replacement value of buildings range from $7.51 for the University of Massachusetts to $1.53 for Iowa State.

Allee and Kay cautioned that only the tables taking into account each institutions' scale of operations present meaningful comparisons. And even then, caveats abound because, as Kay put it, "There's a lot of local history behind these numbers in each of these communities."

Indeed, footnotes explaining exceptions sometimes seem to overshadow the tables. From them, the reader learns, for example, that:

- Although Michigan State University is listed as having paid no property taxes during the most recent year, private businesses pay property taxes for buildings on land leased from the university.

-more-

page 4 - CISER

- Colgate makes payments in lieu of taxes on one of the 13 fraternity and sorority facilities.
- Cornell maintains more than 15 miles of streets and roads; the table indicates it spends $1.05 million on street maintenance services, more than double the amount spent by any of the other institutions surveyed, many of which rely principally on local municipalities for such services.

Other important variables reflected in the tables and their footnotes include the percentage of locally derived revenue generated by property taxes, how dependent each institution's local government is on the federal and state government and other sources for funds, and the existence and scope of state reimbursement and revenue-sharing programs.

The researchers pointed out that they found no relationship between size of payments for services supplied by local governments and those provided internally; nor is there any indication that certain types of schools pay more than others.

APPENDIX D

THE PLANNING AND COORDINATION COUNCIL

OF THE

CITY OF CHARLOTTESVILLE, ALBEMARLE COUNTY AND UNIVERSITY OF VIRGINIA

Introduction

Most cities and towns contain large institutions, such as universities, state or federal facilities, or large private corporations. Charlottesville, home of the University of Virginia, is no exception. Institutions like the University of Virginia, because of their size, often have development related needs and goals independent of the policies of the localities surrounding them. Frequently, local governments and large institutions share the same goals, but have no established means of ongoing communication and cooperation to discuss issues of mutual concern. This entry describes how the City of Charlottesville, Albemarle County and University of Virginia addressed their joint communication and coordination concerns through the creation of the Planning and Coordination Council (PACC).

The Planning and Coordination Council is the principal planning and coordination link between the City of Charlottesville, Albemarle County and the University of Virginia. The PACC completed its first full year in 1987. Through it, the three jurisdictions have established a standard process to discuss and cooperate on issues of mutual concern. The PACC process was created as a result of a "Joint Memorandum of Understanding" signed in 1986. This three party agreement not only creates an avenue for general cooperation; it also requires all three jurisdictions to develop uniform planning procedures, especially in relation to their comprehensive plans and land use plans. In doing so, the memorandum has, for the first time, created an on-going mechanism of communication.

APPENDIX D (CON'T)

Background

If a region could be described in biological terms, the University of Virginia would be the heart of Charlottesville and Albemarle County. It is the area's principal employer and accounts for over fifty percent of its business volume. In 1986, more than 17,000 students were enrolled at the University. The contribution that students, faculty and staff make is not only invaluable to the overall well being of the community; they help define the area's character.

While the City of Charlottesville, Albemarle County and the University of Virginia are three distinct jurisdictions, with different priorities and orientations, each is concerned about the general welfare of the community. For many years, the relationship between these three jurisdictions was never formally stated, and therefore was subject to occasional disagreements and misunderstandings. The rapid growth of the University of Virginia between 1970 and 1985, with a sixty percent increase in enrollment, created significant development pressure in adjacent neighborhoods in both Charlottesville and Albemarle County. Both the City and the County were also worried about the acquisition of additional land by the University, and its subsequent removal from the property tax roles and exemption from local land use controls. The University, in turn, was concerned about its development future, and what it perceived as a growing antagonism in the community towards its growth policies.

By 1985 it became apparent that it was in the best interest of all three jurisdictions to organize a permanent body to discuss mutual concerns. That same year, the University commissioned the Urban Land Institute of Washington D.C. to undertake a study of its future real estate policies and development

APPENDIX D (CON'T)

strategies. This study recommended, among other things, that the University become more sensitive to community concerns, and that a "joint memorandum of understanding" be adopted outlining levels of cooperation with the City of Charlottesville and Albemarle County. It was through this process that the Planning and Coordination Council was created.

How the PACC Works

The Joint Memorandum of Understanding, signed by the three jurisdictions in the spring of 1986, outlines the extent of cooperation between the City of Charlottesville, Albemarle County and University of Virginia. In addition to creating the PACC, the agreement accomplished the following;

The University agreed to:

1. Voluntarily comply with land use plans and regulations in an area that includes most of Charlottesville and Albemarle County. For a critical area surrounding the University (See Area "B" below), the University agreed to voluntarily submit its construction and/or development plans for review by the City or County.

2. Anticipate the formation of the University of Virginia Real Estate Foundation. Property acquired by the foundation, while held for the University, is not exempt from local property taxes and land use controls.

3. Accept representatives from the City and County as non-voting members of the Master Plan Committee, the University's principal planning group.

The City and County agreed to:

1. Submit to the University all proposed changes to land use plans or

regulations affecting Area B.

2. Include a representative of the University as a non-voting member of their planning commissions.

The City, County and University jointly agreed to

1. Adopt the same land use planning period.

2. Adopt a substantially similar topical outline for the purpose of describing their land use plans. This has subsequently lead to an agreement to use uniform demographic and economic data in revising the comprehensive plan of each jurisdiction, as well as to review mutual issues of concern, such as housing, transportation, and utility needs.

A critical part of the joint memorandum is the establishment of three "zones" around the University, Areas "A", "B" and "C" (see attached map). Area A includes University owned land either on its Grounds or adjacent to its borders. Area B is made up of land which immediately surrounds the University and on which the actions of any or all of the three jurisdictions may have an effect. Area C is all land not part of Areas A or B. For the PACC, Area B is the most important. It is in this area that the Planning and Coordination Council will be concentrating its efforts; through the development of neighborhood studies and in subsequent planning activities.

The attached organization chart shows the review process for studies and reports prepared through the Planning and Coordination Council. The PACC Policy and Technical Committees meet on a regular basis to discuss issues of

mutual concern. The Policy Committee meets quarterly and consists of three policy level (mayor, University president, etc.) decision makers from each jurisdiction. The Technical Committee (planning department heads, planning commissioners, etc.) meets monthly to discuss more "nuts and bolts" issues. Citizen advisory committees are appointed for each neighborhood study undertaken, as is a task force made up of representatives from the Technical Committee.

Current Status/Future Directions

Currently, the principal task of the Planning and Coordination Council is the development and review of neighborhood studies in Area B. Eight neighborhood studies (four of which are entirely in Albemarle County) are being undertaken as part of this effort. Of these, the "Venable - Emmet Street Neighborhood Study" has been completed, while the "West Main Street - University Hospital Neighborhood Study" and the "Jefferson Park Avenue - Fontaine Avenue Neighborhood Study" are in draft stage. The remaining studies are targeted for completion by the end of 1988. Once all these studies are complete, their findings will be incorporated into the comprehensive plans of all three jurisdictions. In 1988, the City, County and University are all revising their comprehensive plans in an effort to improve coordination in the development of future planning initiatives.

Conclusion

The creation of the City-County-University Planning and Coordination Council has done much more than what was outlined in the original joint memorandum of understanding. Not only has the PACC established an intra-jurisdictional planning organization. It has, for the first time, created on-going cooperative relationship between the City of Charlottesville,

APPENDIX D (CON'T)

Albemarle County and the University of Virginia. Issues and actions that previously may have been misinterpreted through lack of communication are now topics of routine discussion at PACC meetings. Officials from all three jurisdictions today feel confident that the right people will hear the right things about mutual concerns.

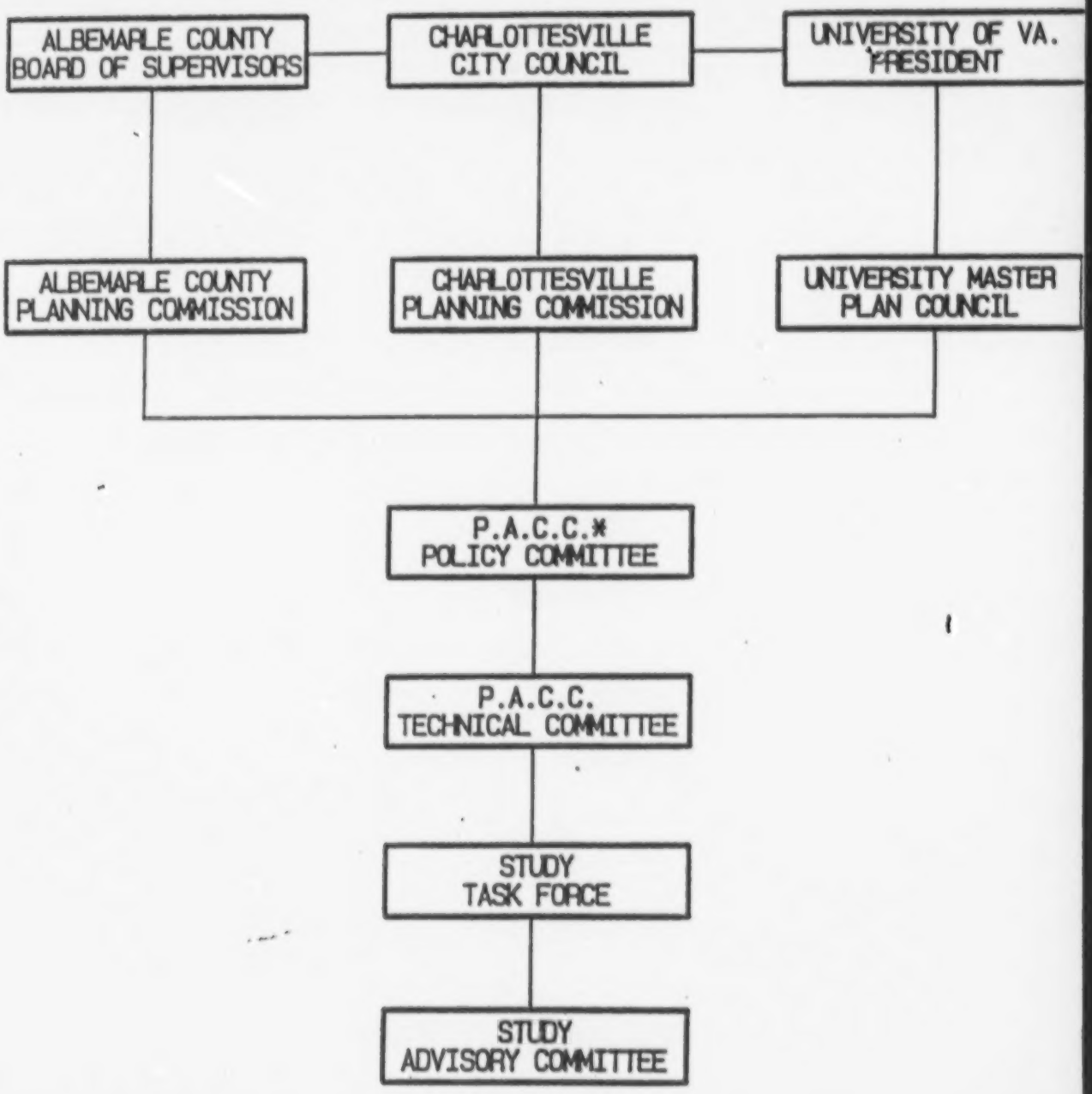
Finally, the greatest benefit of the PACC process is to the community. For the first time, the three jurisdictions, through the development of the "Area B" neighborhood studies, are taking a coordinated approach to addressing the needs of local residents. Many of these residents, in turn, feel that their concerns relating to the University are now being effectively addressed. It is hoped that as the Planning and Coordination Council process continues, the three jurisdictions and the entire community will better understand each other.

D.C.D.

4/27/88

APPENDIX D (CON'T)

# CITY-COUNTY-UNIVERSITY STUDY PROCESS



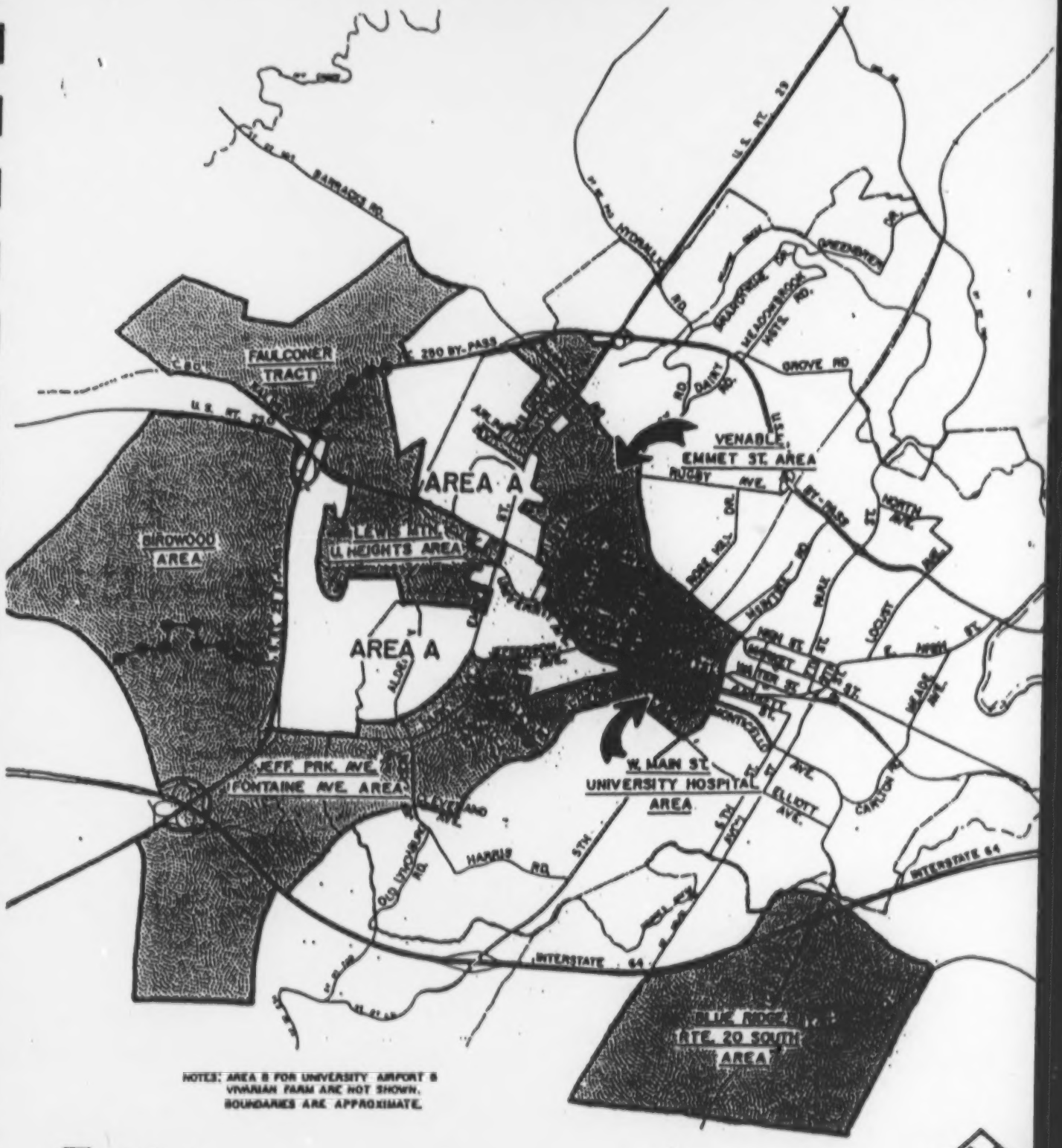

*Planning and Coordination Council Policy Committee also approves the reports in concurrence with juristictions.

DCD
7/16/87

APPENDIX D (CON'T)

# AREA B

## CITY-COUNTY-UNIVERSITY PLANNING AND COORDINATION COUNCIL

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APPENDIX E

# UNIVERSITY OF MARYLAND AT COLLEGE PARK

## CAMPUS HOUSING POLICY AND INITIATIVES

Prepared for the Chairmen of the
Senate Budget and Taxation and
House Appropriations Committees
of the General Assembly

September 1, 1989

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## INTRODUCTION

This document responds to the request made in the 1989 budget bill passed by the General Assembly that the University of Maryland at College Park advise the House Appropriations and the Senate Budget and Taxation Committees on the development of a campus housing policy. The bill requested that we address our position with regard to:

- Constructing new, on-campus, privately-financed undergraduate and graduate student housing;
- Reforming the pricing of on-campus room and board to reflect the supply of and demand for particular types of housing and meals;
- Reducing the negative impacts of fraternities, sororities, and student group housing in single family home neighborhoods;
- Using the University's authority, outlined in the Attorney General opinion 89-002, to set and enforce standards of acceptable student behavior in off-campus housing; and
- Working with Prince George's County, the City of College Park, other surrounding communities and property owners to develop mutually agreed-upon goals for the location of student housing, both on- and off-campus.

Our response to the General Assembly's request should be reviewed within the context of current policies and practices which have served the University, its students, and the local community well over the past two decades. We discuss relevant policies within the text of this report and have included a listing of major policies in the Appendix.

Also relevant to the General Assembly's review of this document are several assumptions underlying our current housing and related policies.

1. We strongly believe that living in campus residence halls is valuable and should enhance any student's academic performance. We also recognize that not every student wants to live on campus and that many students will choose instead to continue to live at home or to rent off-campus. No student is, therefore, required to live in any University-owned housing.

2. The current process of undergraduate enrollment reduction at College Park has direct bearing on planning for on-campus housing. Among the effects of a 20 percent enrollment reduction has been a dramatic decrease in the size of the annual waiting lists for on-campus housing. Fall semester

waiting lists of about 1,000 students, common up until 1988, are not expected to occur again. We now assume that nearly every student who wishes to live in the residence halls is able to do so at the start of his or her enrollment or shortly thereafter. Rather than planning for additional on-campus residence hall space, the University will need to formulate a more broadly based marketing strategy to insure that occupancy levels remain high in existing residence hall spaces.

3. Students must be viewed by the University and the surrounding communities as valued citizens. Both on campus and off, they attend our civic functions, shop in our stores, and eat in our restaurants. While misbehavior by some students does occur, nearly all students are responsible citizens of the communities in which they live. The University and responsible officials in neighboring jurisdictions are encouraged to recognize and value students as interested, informed, and conscientious members of the community.

The University's response to the specific requests of the General Assembly has been developed with these assumptions in mind.

RESPONSE TO: **Constructing new, on-campus, privately-financed undergraduate and graduate student housing**

**Initiatives under consideration:**

- *Close monitoring of demand for housing and analysis of the effectiveness of various marketing strategies*
- *Identification of an on-campus location that would be suitable for construction of up to 400 new housing units (i.e., space for 800 to 1,600 students), should demand for housing warrant construction*
- *Determination of the feasibility of funding any new construction from sources other than the University's capital allocation through at least the mid-1990's*

DISCUSSION

- *Close monitoring of demand for housing and analysis of the effectiveness of various marketing strategies*

The University does not support the construction of additional housing spaces for undergraduate students, whether jointly by the University or in conjunction with a private developer. It is our belief that the current number of spaces in residence halls will be sufficient for the foreseeable future to meet demand from undergraduate students.

The on-campus residence halls capacity is 8,164 beds, including 445 spaces which are either being occupied as temporary housing for students displaced from fraternity houses under renovation, or not being occupied at all due to insufficient demand. Since the initiation of the planned enrollment reductions for entering freshmen and entering transfer undergraduates, the number of students on the annual waiting list for residence hall spaces at the start of fall semester has dropped significantly. The fall waiting list fell from 1,329 students in 1987, to 291 students in 1988, and to zero in 1989. During this same period, the University has increased the percentage of entering freshman students who are housed in residence halls from 59 percent in the fall of 1987, to 71 percent in the fall of 1988, and a projected 75 percent for this fall.

We will monitor the demand for housing from undergraduates and graduates alike and, if trends of the past three years change, we will be prepared to consider the renovation of existing facilities and construction of new facilities. We also intend to increase our marketing efforts for residence halls to ensure that all existing spaces are occupied.

We have taken many steps in recent years to increase the attractiveness of these facilities. A total of 2,075 air-conditioned, carpeted and newly furnished bed-spaces have been restored to the residence halls inventory through renovations in 13 older buildings or added through new construction in the on-campus Leonardtown apartment complex. We have also established 21 special study facilities in residence halls, in addition to the existing 50 floor lounges and three community centers. Many of these special study facilities are equipped with personal computer workstations and printers, and tables and chairs for quiet, independent study. In addition, we will:

- Open in fall 1989 a Language House in the renovated St. Mary's Hall for students who want an immersion experience in the study of other languages. The Language House has attracted 225 applications for 94 spaces.

- Complete planning in FY 90 for an Honors House, where students in the University Honors program will be assigned through a competitive process. According to current plans, this facility should open in the renovated Anne Arundel Hall in fall semester, 1991.

- Complete planning in FY 90 for an International House for students who want an immersion experience in the study of other cultures. This facility should open in the renovated Dorchester Hall in the fall.

- *Identification of an on-campus location that would be suitable for construction of up to 400 new housing units (i.e., space for 800 to 1,600 students), should demand for housing warrant construction*

The University is reassessing demand for graduate student housing and exploring alternatives through which any desirable new construction could be funded. At present, our best estimate is that up to 400 additional housing units should be developed within the next few years. We have asked consultants preparing a revised Campus Master Plan to identify a site where these new housing units might be constructed. While a suitable site for such construction can be identified, any decision to pursue funding sources for new construction will be predicated by a conclusion that (a) the existing residence hall spaces are insufficient to meet student demand, and (b) renovation of up to three residence halls currently utilized for temporary housing needs would be an inappropriate alternative to new construction.

Our current belief is that these new housing units should include a combination of two-, three- and four-person units, having a total capacity of 800 to 1,600 students. We also believe, based on current student demographics and student preference, that any such new spaces should be constructed with kitchens and have a majority of single bedrooms. Demand for on-campus housing space

is likely to result in these units being assigned solely to single (i.e., unmarried or spouse not present) graduate students.

*Determination of the feasibility of funding for any new construction from sources other than the University's capital allocation through at least the mid-1990's*

Private developers provide one source of acquiring the revenues needed to support new construction. We have met or intend to meet with private developers who have expressed interest in exploring various ways that they may work with the University to provide the 400 housing units mentioned above. At the point we are prepared to add to our existing housing facility inventory, we will prepare a Request for Proposal for publication in the Maryland Register, thus making all interested developers aware of our desire to receive their ideas or proposals. In addition, we are aware that the State of Maryland's Department of Budget and Fiscal Planning, in conjunction with Morgan State University, is investigating alternate means of financing construction and renovation of facilities on that campus. We will solicit ideas and guidance from these sources.

Any desire on the University's part to construct new facilities must be tempered by concern for the costs involved. Fees now charged to resident students include assessments for construction and renovation debt retirement, facilities renewal, and provision of additional amenities, particularly improved study spaces that enhance the academic environment in residence halls.

Since 1980, the University has constructed a 400-bed unit addition to the Leonardtown apartment complex and completed extensive renovations in about 1,500 spaces in the interiors of 13 residence halls within the older South Hill area of the campus. These renovations projects have resulted in a capital improvements debt to the residence hall program of approximately $44,500,000. This debt is amortized from revenues collected as part of residence hall room fees charged to students. For FY 90, $560 of the $2,390 annual room fee for each resident is pledged to debt retirement.

The University is committed to the continuation of this renovation program in our older North Hill residence halls and to an extensive preventive and deferred maintenance program in our 11 high-rise North Campus residence halls. Because of their age, renovation and refurbishment of existing facilities is a long-term requirement for the campus. Preventive and deferred maintenance projects will need to be scheduled and funded in every year for the foreseeable future. These projects will require additional increases in residence halls fees. Since we must be concerned that these rents do not become a deterrent to students living on campus, we may not be able to afford new construction even with the assistance of a private developer.

RESPONSE TO: **Reforming the pricing of on-campus room and board to reflect the supply of and demand for particular types of housing and meals**

**Initiatives under consideration:**

- *Consideration of options to the current dining program that provide more flexibility for students to control their food expenditures*
- *Establishment of an installment payment plan for tuition, housing, meals and other University expenses, in place of the current "pay up front" policy*
- *Consideration of whether a differentiated rate structure should be created for apartment-style and traditional "dormitory-style" residence halls*

DISCUSSION

- *Consideration of options to the current dining program that provide more flexibility for students to control their food expenditures*

The University currently provides a meal plan known as the Point Plan, an a la carte system in which students use a photo identification card to purchase a beverage, snack, or full meal. A computer monitors the transaction and reports the new balance immediately. This type of plan provides the lowest cost alternative for students within the context of existing hours of service and flexibility of food choices. Other alternatives, such as a return to the traditional "all you can eat" plan, would be more costly if offered in conjunction with the current plan.

The Point Plan is extremely popular with students. In its third semester of existence, when other choices were available, the number of students who voluntarily participated in the Point Plan increased from 302 to 3,857. There are other measures of the popularity of our Point Plan. Leaders in the college food service industry recognize our dining services department as one of the most innovative in the nation. In each of the past two years, College Park staff have made presentations about the Point Plan at national conferences; in the past year, our food service operations were visited by officials from 14 other colleges and universities and from four area student governments who wanted to know more about establishing similar programs at their campuses.

Like all consumers, our students would like to pay a lower price without having to sacrifice any of the flexibility (multiple locations for dining and snacking, extended hours, wide menu variety) that the current plan offers. These

are sacrifices that would need to be made if the cost of the current Point Plan were to be lowered. We are, however, considering different versions of the current Point Plan that would let students select from higher priced and lower priced packages based on their dietary needs. At a minimum, students would be required to participate in a basic Point Plan to ensure that we can maintain our current hours and staffing levels and to discourage students from preparing meals in their residence halls.

- *Establishment of an installment payment plan for tuition, housing, meals, and other University expenses in place of the current "pay up front" policy*

Under current policy, fees for residence halls and dining services must be paid in advance at the start of the fall and spring semesters. For many students, including many graduate students and students who are independent of parental or guardian support, this policy constitutes a financial burden and can be a disincentive to applying to live on campus. The University is currently investigating various installment payment plans that could be implemented no sooner than the 1990-1991 academic year.

- *Consideration of whether a differentiated rate structure should be created for apartment-style and traditional "dormitory-style" residence halls*

The University will give new consideration to the creation of a differentiated rate structure for residence hall fees. Under such an arrangement, students would pay a higher amount if assigned to apartment-style housing units (where greater costs are incurred for carpet, kitchen and bathroom fixtures, additional furnishings, etc.). Analysis of these particular cost factors will be completed during FY 90. As carpeting and major appliances installed in renovated apartments and suites during the 1980's need replacement, the University will consider a differentiated rate structure as a means of acquiring additional revenues to offset these expenses.

However, as a general policy, the University has wanted to have the same fees paid by all students to avoid situations in which an individual student's ability to pay would dictate whether he or she could move to a preferred facility, such as a kitchen-equipped apartment or kitchenless suite, where air conditioning, carpeting, private baths and newer furniture are offered at no additional cost. Review of our student demographics and the profile of students who receive financial assistance may show that minority students would be disproportionately affected by any such change in policy. If this or some other discriminatory effect would result from the implementation of a differentiated rate structure, the University will be less inclined to pursue this initiative.

If our housing rate structure were determined on the basis of operational expenses, fees for kitchen-equipped, apartment-style housing units would have to

be increased substantially. Since access to these facilities encourages students to remain on campus for housing, additional fee increases could be a deterrent to continued residence by older undergraduate students. These students may find it would be more cost-effective to live in apartments off-campus. This development would also result in decreased University interest in this initiative.

Our current room assignment policies allow students to move easily, on a space available basis, to the more popular apartment-style units. In recent years, about 1,000 residents have been moved each fall, at their initiative, from traditional "dormitory-style" buildings to the apartments or suites. We want students to receive every encouragement to move into residence halls as freshmen and remain for the duration of their College Park careers. Therefore, we have specific planning underway for steps to encourage retention in the residence halls. The most significant of these steps are:

- Refurbishment of existing study lounges in the traditional "dormitory-style" buildings and establishment of additional study spaces in order to enhance the academic environment within residence halls.

- Determination of whether our current "priority for room selection" policy in residence halls (under which students have preference in their current assignments and can "pull in" new roommates) should be modified to permit roommates or groupings of four to seven students in traditional "dormitory-style" buildings to move, as a group, to apartment-style units.

## A Related Consideration

Another way of viewing pricing considerations for room and board is to recognize that costs to students could be reduced, or cost increases avoided in future years, if the state of Maryland would enact some provision for State support for residential and dining facilities and services. By legislative intent in the early 1970's, the undergraduate residence halls, graduate apartments and dining departments at the University of Maryland at College Park became fully self-supporting departments. As such, these departments are responsible for generating revenues that are sufficient to meet all fuel and utilities, maintenance, overhead and capital expenses, in addition to all staffing and other program expenses. This requirement has made these departments highly dependent upon fees charged to students. The departments use their fees and services to acquire the necessary revenues to operate 35 residence halls, five major dining facilities and two graduate apartment complexes. This fact, coupled with annual inflationary pressure and the unavoidable need to renovate deteriorated facilities, has led to significant increases in fees almost every year.

Action by the state of Maryland could provide relief from some of the existing mandated requirements, such as those requiring us to meet all expenses associated with debt retirement, utilities, overhead and funding of facilities renewal expenditures. This

would allow the University's self-supporting departments to achieve their goals of maintaining and renovating their facilities while minimizing costs to the student. If lowered significantly, our campus residence hall fees would be more competitive with the off-campus rental environment and we might expect that some students would be attracted back to campus.

RESPONSE TO: **Reducing the negative impacts of fraternities, sororities, and student group housing in single family home neighborhoods**

Initiatives under consideration:

- *Development of a statement of formal relationship by and between the University and all fraternities and sororities*
- *Exploration of the possibility of establishing a new oversight unit within the City of College Park designed to assist in the management of student-related issues*
- *Establishment of a neighborhood committee on which City of College Park homeowners and student residents of fraternities and sororities are represented*
- *Determination of whether current residence hall facilities should be redesigned and renovated for occupancy by fraternity and sorority chapters that either do not have a residential facility or prefer to be located on campus*

DISCUSSION

The University and City of College Park share concern for the occasional negative effects to homeowners in single family neighborhoods of having Greek chapter houses or other student group houses in close proximity. Many college communities across the nation have these same problems.

Students who reside in nearby jurisdictions are entitled to all the benefits of, and must exercise all the responsibilities of, citizenship in that community. The University recognizes it has a measure of responsibility, shared with the City of College Park, to help ensure that students will be responsible members of the community. The University has initiated a series of actions that are designed to have a positive effect on the quality of the environment within the City for both students and neighborhood residents. These actions are identified below.

- *Development of a statement of formal relationship by and between the University and all fraternities and sororities*

This document will establish new and clarify existing mutual expectations between the University and the registered fraternity and sorority chapters. Specifically, it will provide a mechanism whereby the University will state more clearly its expectations for annual reviews, member and chapter responsibility for behavior, and alumni involvement. Drafts of this document are being reviewed by all chapter presidents and alumni representatives, and agreement on the final statement is planned for late fall, 1989.

- *Exploration of the possibility of establishing a new oversight unit within the City of College Park designed to assist in the management of student-related issues*

This office, perhaps supervised by the City Manager, could be staffed to respond to both predictable and unexpected problems caused by student activity in the City. The office might: (a) publish a handbook that explains students' responsibilities as residents of the local community and disseminate it to residents of fraternities and sororities and to residence hall students who leave to move into off-campus housing; (b) license and provide enforcement in group homes to ensure compliance with restrictions on the number of authorized residents in these units; (c) implement a parking control and towing program for large events and on evenings when problems can be expected; (d) administer a judicial review system whereby students who are alleged to have misbehaved in the City have their cases heard and sanctions imposed or recommended to the appropriate authority; and (e) serve as ombudsperson to the City and the University by confronting directly alleged misbehavior and mediating conflicts.

- *Establishment of a neighborhood committee on which City of College Park homeowners and student residents of fraternities and sororities are represented*

City of College Park residents and student residents of Greek chapter houses located within the City will begin meeting as a neighborhood committee this fall. The committee's purpose is to raise and resolve issues of mutual concern. The committee will recommend to the City Council and to President William E. Kirwan those actions that require City or University commitments.

- *Determination of whether current residence hall facilities should be redesigned and renovated for occupancy by fraternity and sorority chapters that either do not have a residential facility or prefer to be located on campus*

Among the registered fraternities and sororities at the University, there are a number of chapters that do not occupy a residence of any type and whose members live apart from one another--in residence halls, at home, and in off-campus locations. From time to time, these chapters have asked to have a

campus-owned residential facility for members. Because of the past high demand for residence hall spaces, it has been largely impossible to accommodate these requests. Recognizing that planned reductions in enrollment at the undergraduate level have greatly reduced, if not eliminated, waiting lists for on-campus housing, the University will consider the feasibility of moving some of these chapters into residence halls.

Existing residence hall facilities are not ideally equipped to accommodate fraternity and sorority chapters. Significantly more common area space than residence halls currently provide would be needed to accommodate the chapters. Therefore, we expect that implementation of this initiative will require several steps: (a) an assessment of chapters' interest, given the projection of cost-per-student that we would provide; (b) determination of funding sources that would permit redesign and renovation of existing space; and (c) identification of desired locations and scheduling of displacements of any affected residence hall students.

In addition to these four major initiatives, we will also continue to pursue implementation of two other programs that also have some effect on the quality of life in City neighborhoods. These are:

- Establishment of a requirement that a house director live in each fraternity and sorority facility owned by the University. These individuals will serve in a capacity similar to that of graduate-level supervisory staff in the residence halls, having responsibility for the chapter house's physical and academic environment. Currently, each of the sororities and two fraternities have individuals who serve in this capacity. The requirement is being phased in for the remaining chapter as their houses are renovated or newly leased. The University is not able to require house directors in fraternity and sorority facilities that are not owned by the University. However, we do encourage this action by those chapters and plan to communicate with house corporations and national offices to encourage implementation of this staffing pattern.

- Incorporation into the publications and programs of our Off-Campus Housing Service (OCHS) information about appropriate behavior for students who live in single family neighborhoods. We are considering the best means of including this information in materials provided to all students who use OCHS's computer-based, off-campus housing search system; in materials sent to all area landlords and homeowners who list vacancies for rental to students; and in the Tenant Survival Kit jointly produced with the Student Legal Aid Office and UMCP. This information has been provided to students and parents in this summer's orientation sessions.

RESPONSE TO: **Using the University's authority, outlined in Attorney General Opinion 82-002, to set and enforce standards of acceptable student behavior in off-campus housing**

**Initiatives under consideration:**

- *Creation of an office in the City of College Park whose mission, in part, is to adjudicate allegations of misbehavior by UMCP students that occurs within the City*
- *Extension of University disciplinary processes to include activities of fraternities and sororities and individual students that occur off-campus*

DISCUSSION

- *Creation of an office in the City of College Park whose mission, in part, is to adjudicate allegations of misbehavior by UMCP students that occurs within the City*

As mentioned on page 11 of this document, the University has proposed the creation of an office within the City of College Park with authority to adjudicate allegations of violations within the City of rules and regulations promulgated in the University's Code of Student Conduct.

- *Extension of University disciplinary processes to include activities of fraternities and sororities and individual students that occur off-campus*

Since Opinion 89-002 of the Attorney General was issued, the Chancellor of the University of Maryland System has recommended to the Board of Regents a policy which, if enacted, would require each institution to revise its student disciplinary policies to include provisions that (a) jurisdiction be extended to "organized activities" of registered or recognized student groups, including fraternities and sororities; and (b) individual students accused of "serious criminal offenses on- or off-campus" be subject to campus disciplinary action in addition to any possible civil or criminal proceedings. The new policy also might enable each institution to consider extending its disciplinary jurisdiction to alleged incidents of less serious individual behavior.

RESPONSE TO: **Working with Prince George's County, the City of College Park, other surrounding communities and property owners to develop mutually agreed-upon goals for the location of student housing, both on- and off-campus**

**Initiatives under consideration:**

- *Identification of a site on the campus for construction of additional housing units*
- *Participation in planning and review processes originating in local jurisdictions*
- *Continuation of University and City of College Park Cooperation Committee meetings*

DISCUSSION

- *Identification of a site on the campus for construction of additional housing units*

As mentioned earlier, we have employed a consultant to help revise the Campus Master Plan and to recommend a location on the campus for the construction of up to 400 additional housing units. The consultant will confer, as appropriate, with citizens' associations or other similar advisory resources in neighboring jurisdictions, such as Adelphi and College Park. The City of College Park's City Manager is a member of the Campus Master Plan committee.

- *Participation in planning and review processes originating in local jurisdictions*

The University has had an opportunity to comment on the Maryland National Parks and Planning Commission's process for updating the Langley Park-College Park preliminary Master Plan. This document, as currently drafted, proposes that all vacant parcels of land in the "Old Town" area of College Park be rezoned to permit construction solely of single family detached homes.

- *Continuation of University and City of College Park Cooperation Committee meetings*

College Park Mayor Anna Owens and University President William E. Kirwan have begun to convene regular meetings of a City/Campus Cooperation Committee. Issues of mutual concern are addressed by the City Manager and representatives of the City Council and various officials of the University. These meetings have been and will continue to be forums for advising these senior officials of concerns and possible solutions to problems. These meetings also

serve as catalysts for specific actions and initiatives undertaken by the City or the University, or jointly by the two institutions.

# Oregon State University Policy on Sales of Goods and Services

## INTRODUCTION

### Policy Development

An Ad Hoc Committee on Local Business/University Relations was appointed by President John Byrne in 1986 to review university activities regarded as being in competition with local businesses. In his charge to the committee, President Byrne also asked for a general review of interaction between the university and the local community, and, finally, for recommendations addressing how these relationships could be improved.

The committee included representatives from local businesses, as well as OSU students, staff, and faculty. After reviewing areas of interaction and areas of conflict, listening to representatives from local businesses, and reviewing policies adopted by other colleges and universities addressing these issues, the committee submitted to President Byrne a general, university-wide policy on the sales of goods and services.

The proposed policy incorporated provisions of an Internal Management Directive (IMD) on Education-Related Business Activities, previously adopted by the Oregon State Board of Higher Education. That directive established uniform minimum standards for all institutions within the State System.

The proposed policy was circulated within the university by President Byrne for review and comment. With minor amendments which resulted from the review process, the recommended policy has now been adopted, and is effective November 15, 1989.

### Policy Rationale

**(as Submitted by the Committee for Local Business/University Relations)**

As Oregon's Land Grant and Sea Grant university, Oregon State University's mission and obligations include teaching, research, and service to many constituencies. Funding for its diverse activities is derived from federal, state, other governmental/public agencies, and private sources. Competition for public funding at all levels of government and the continuing goal of making the most effective use of limited resources have created an environment in which some university components are encouraged to become self-supporting. Self-support is accomplished through direct compensation for goods and services.

Conflict may result when university enterprises are deemed to be in competition with private entrepreneurs. These conflicts must be reduced or eliminated through a process which is sensitive to the need for entrepreneurial activity by both parties, because both parties are fulfilling crucial societal and economic roles.

Tax implications, for both income and property taxes, are frequently found in these areas of conflict. Legislative goals of discouraging "unfair competition" and increasing tax revenues have resulted in close scrutiny to determine what is and is not an "unrelated business activity," and subject to unrelated business income tax.

The committee acknowledges the substantial potential of Congressional review of existing tax policy and possible tax law amendments as a means of resolving private/public competition conflicts. Elimination of such conflicts by adoption of local policies of

the nature proposed by the committee is preferred over tax law amendments which could have unanticipated and undesirable impacts on economically and socially important academic and public sector entrepreneurial activities.

### Scope of Policy, Exclusions

This policy establishes guidelines and a process under which the sales of goods and services for fees may be approved; it establishes a mechanism for the review of such sales. Activities central to the mission and obligations of the university are excluded from this policy.

Excluded are activities which charge for instruction in regular, extension, evening, and continuing education; services provided in the practicum aspects of university instructional and research programs; services mandated by state statutes; sales of residual products of research programs; services for fees in its extracurricular or residential life programs, including residence halls, food services, alumni, athletic and recreational programs, conferences and meetings under the auspices of the LaSells Stewart Center, and the performing arts programs.

## POLICY ON SALES OF GOODS AND SERVICES FOR FEES

Oregon State University may engage in the direct sale of goods and services to individuals, groups, or external agencies for fees only when those services or goods are directly and substantially related to the mission of the university, which includes teaching, research, and public service. Charges for such goods and services shall be determined taking into account their full cost, including university overhead, as well as the prices of such items in the marketplace.

When the question of whether or not any particular education-related business activity should be provided by Oregon State University, a determination shall first be made as to whether the activity is currently and adequately provided by private businesses. If the services of private businesses are considered adequate but the activity is nevertheless deemed important to be provided by the university, the reasons and justification for the activity shall be stated in writing and submitted by the President or his designee to the Executive Vice Chancellor of the Oregon State System of Higher Education or his designee, in accordance with applicable policies of the State Board of Higher Education. (Required by OSSHE IMD on Education-Related Business Activity)

State Board policy allows system institutions to promote and market in off-campus public media only those services and events which are of interest to the general public, such as cultural presentations, intercollegiate athletics contests, and educational programs.

When entering into contractual arrangements with third parties to provide goods and services in fulfillment of obligations of the university, the intent and spirit of the policies expressed herein shall, to the extent practicable, be incorporated in the terms and conditions of such contracts.

### Criteria

There are three distinct categories of relevant transactions which occur at the university:

1. internal university interdepartmental transactions for goods and services necessary to the maintenance of the mission of the university;

2. sales of goods and services to faculty, staff, and students which are for the convenience of and in support of the broad mission of the university; and

3. sales to persons or organizations external to the university. Transactions in category one are characterized as within the "campus community;" transactions in category two are characterized as within the "university community;" and in three as the

"external community." The unique nature of each of these kinds of transactions makes it appropriate to use different criteria in evaluating requests for each type of sales program.

### Campus Community, Non-cash Transactions

Internal non-cash transactions of official university business between units, departments, and offices, necessary to meet the teaching, research, and service mission of the university, shall be governed by the university regulations on budget, accounting, and auditing which apply to such transactions.

### Criteria for Sales to the University Community

Each of the following criteria shall be used in assessing the validity of providing goods and services for charge to students, faculty, and staff.

1. The good or service is substantially and directly related to the university's instructional, research, or public service mission;

2. Provision of the good or service on campus represents a special convenience to and supports the campus community or facilitates the extracurricular, public service, or residential life of the campus community;

3. The price or fee for the good or service is established at such a level as to account for the full direct and indirect cost, including university overhead;

4. Procedures are in place for ensuring that goods or services are provided only to members of the university community.

### Criteria for Sales to the External Community

The university shall not engage in any sales activities solely for the purpose of raising revenue to support an educational, service, or research activity if the goods or services sold are not directly and substantially related to the educational, research or service program or activity.

Each of the following criteria shall be used in assessing the validity of providing goods or services to the external community:

1. The good or service represents a resource which is directly related to a unit's educational, research, or service mission, which is not commonly available or otherwise easily accessible, and for which there is a demand from the external community.

2. The price or fee of the good or service is established to account for the full costs of the goods or services, including university overhead. The price of such items in the private marketplace shall be taken into account in establishing the price or fee.

### Review and Approval Procedures

Except in instances requiring the approval of the Executive Vice Chancellor of the Oregon State System of Higher Education or his or her designee, approval for the direct sale of any goods or services covered by this policy shall be vested in Deans and Vice Presidents for the units under their authority.

Before any sales project may be implemented, the unit proposing the project shall provide to the Dean/Vice President a request setting forth all pertinent information about the sales plan, and justification for such program addressing the elements of this policy and the stated evaluation criteria. The Dean or Vice President shall, if approving the project, notify the Office of Budgets and Planning of the approval as a condition to the creation of a revenue budget, and provide the Budget Office with copies of the documentation supporting the request. State Board policy requires the adoption of a fee schedule as part of this process.

Each category of goods or services sold is to be considered individually so as to avoid the unplanned expansion of any sales program. All new categories of sales shall be justified to and reviewed by the Dean/Vice President in accord with this policy.

## Oversight

The Vice President for Finance and Administration is designated as the officer who shall be available to:

1. Resolve matters concerning the internal application of this policy. It is the role of the Office of Budgets and Planning to review requests from Deans/Vice Presidents to establish revenue budgets. Should the Budget Office believe that the request is inconsistent with this policy, it shall refer the matter to the Vice President for Finance and Administration for final decision.

2. Address questions from members of the external community about specific sales programs, and refer such questions when he or she deems it appropriate, to the Education and Business Forum described below.

3. Review all proposed sales of goods or services to other governmental agencies, because such sales frequently involve university-wide considerations.

## Review of Existing Programs

All current sales programs and contracts which may be subject to either the letter or spirit of this policy shall be evaluated by the Deans/Vice Presidents, following the procedure for initial review and approval stated above, not later than six months after the effective date of this policy.

## Education and Business Forum

The Vice President for University Relations will establish and provide staffing for an "Education and Business Forum" as recommended by the Committee for Local Business/University Relations. Consistent with the recommendations of that committee, regular participants in the Forum should include representatives from the Downtown Corvallis Association, the Corvallis Area Chamber of Commerce, Monroe Avenue Merchants, and any other business, trade, educational, or professional organization in this area. Because university activities affected by this policy are state-wide, participants should also be invited based on nominations provided by the Deans of the Colleges of Agriculture and Forestry.

Among the objectives of the Forum will be improvement of the level of communication and cooperation between the university, the participants, and the organizations they represent. The Forum will also hear reports relating to this policy and its implementation, and be asked to monitor and comment on progress or the lack thereof in meeting the goals of this policy.

**ADOPTED November 1, 1989.**

John V. Byrne President

11/89